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ABSTRACT

For this kit, 106 Association of Research Libraries (ARL) academic libraries were surveyed concerning: (1) current administration/organization; (2) evaluation; (3) patron relations; (4) services; and (5) the impact of online searching on collections. Responses were received from 83 libraries, many of which contributed sample materials. Analyses of the responses indicated that the online search service is most often undertaken by reference staff and offered at most public service points in the library; most professional staff are required to have knowledge of online searching. Evaluation of the online search services and searches is generally carried out through a combination of an informal peer process, patron input, and formal evaluations by supervisors. Most libraries offer online services on a cost recovery basis, while a few charge their clientele an administrative fee above the actual cost. Many provide subsidies to faculty and students by offering "after hours" searching at reduced prices, various combinations of flat fees, and a limited number of free searches per year. Almost all of the surveyed libraries use searches as a source of ready reference and have specific guidelines for such searches. In one-third of the libraries, the availability of online indexing has led to the cancellation of paperbound titles. Some libraries report that the impact of CD-ROM availability is greater than that of online services; however, efficient and cost-effective mediated online searches will continue to be important to library users and academic libraries. This kit includes a summary of the survey results and sample materials on administration/organization, evaluation, user eligibility/charges, limitation of liability, copyright, confidentiality, services/downloading, and ready reference/library loan from 26 U.S. and Canadian libraries. A list of eight selected readings is included. (MAB)

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spec flyer
#154 - May 1989
OMS
Systems and Procedures Exchange Center
ISSN 0160 3582

COMPUTERIZED ONLINE BIBLIOGRAPHIC SEARCHING

by Susan Hocker, Reference Online Services Librarian, Louisiana State University Libraries.

In 1981, when Spec Kit #76 was prepared, online search services were less than ten years old. Today these same services are approaching the end of their second decade as part of academic library services. These same years have seen the advent of microcomputers as search terminals, the introduction of CD-ROM products, the use of end-user search software, and a proliferation of databases and vendors.

Current concerns include contractual limitations vendors and producers have placed on the uses of their services, especially with respect to downloading of bibliographic citations. Copyright and confidentiality are also hot issues in the literature.

Spec Kit #76 covered costs, organization, staffing, and publicity. For this kit, 106 ARL academic libraries were surveyed concerning current administration/organization, evaluation, patron relations, services, and the impact of online searching on collections. One hundred responses were received from eighty-three libraries and seventy-four institutions sent documents for possible inclusion in the kit.

ORGANIZATION. Online search services are firmly entrenched as an integral part of library public services. The service is almost always decentralized with searches undertaken by reference staff and offered at most public service points in the library. Usually, a coordinator reports to head of reference or public services or a committee of searchers provide administrative oversight. Many libraries report a trend toward "holistic librarians" with all professional staff being required to have knowledge of online searching.

EVALUATION. Formal evaluation, whether of the service or the searchers, is not a universal practice. Most libraries report the use of an informal peer process. Colleagues are consulted for assistance with search strategy formulation and online skills are evaluated as a part of the annual review. Approximately one third of the libraries solicit input from patrons and about one third provide for a formal performance evaluation of searchers by supervisors.

As more of the simple searches are taken over by end-users, the complexity and expense of mediated searches is expected to increase. In this case, the need for cost-effectiveness may promote an increase in the formal measurement of the quality of online searching.

PATRON RELATIONS. When online searching began, most libraries charged patrons for the service. This is still the case, with most offering all online services free of charge. Most offer the service on a cost recovery basis. A few libraries charge their primary clientele an administrative fee over and above the cost of the search but many provide subsidies to faculty and/or students. Some do so by offering "after hours" searching at reduced prices or express services for a flat fee. Others offer various combinations of flat fee, limited numbers of free searches per year, and regular cost-recovery services.

Approximately one third of ARL libraries do not allow non-university patrons to use regular search services. Many of these patrons are referred to fee-for-service departments on campus. When non-university clients are eligible for online services they are usually charged a fee over and above the cost of the search. A few libraries report that because they have loaded online databases into their public access catalog, non-university patrons may search for free.

Most university libraries charge for searches and provide services to outside patrons, and they assure that clients are well informed about the online process. Most institutions have some statement to the effect that payment is expected even if no relevant items are retrieved, but less than one third have any formal statement limiting the library's responsibility for the outcome of an online search. The institutions surveyed report that they rely on oral interpretation of the search process.

Vendors also have statements that limit their liability and many databases have been copyrighted by the producers. As contractual intermediaries between the users of information (patrons), and providers of the data (vendors and producers) many libraries recognize their responsibility to see that the users are aware of the limitations and restrictions placed on their use of the data provided.

Most of the searchers are using microcomputers to run online searches. These have the capability to download information and print it on site or to deliver information to the user in electronic format. In addition, more than one third of the respondents are doing some type of post-processing of downloaded information. Elimination of duplicate citations, addition of university call numbers, and improvement

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of the appearance of the product by the deletion of system messages and line noise are the most frequently-cited reasons for modifying the original search. Several libraries mentioned using electronic mail services to deliver search results. The ability to change the original product makes it important to have formal policies concerning the information on restricting which must be imparted to the user, either as a part of the search or as a separate item.

SERVICES. Practically all of the libraries surveyed use online searches as a source of ready reference with reference librarians deciding when a search is appropriate. A few departments will take requests from patrons, but librarians may refuse if the subject is deemed inappropriate. Only three libraries charge the patron for such services if the cost or time exceeds a set limit. All have specific guidelines for such searches and most are limited to 5-10 minutes online. Some libraries use these free searches to prepare for mediated online searches while others specifically exclude such use.

Only half of the respondents use online search services for interlibrary loan support. Libraries are equally split concerning whether reference or ILL staff run such searches. Most use is for verification of citations, with only a few institutions using online services for document delivery and charging patrons for delivery costs. Only one quarter of the libraries charge such searches to the Interlibrary Loan Department. Most libraries absorb the cost either in the reference or online budget. This may depend on whether or not ILL is part of Reference or another department.

IMPACT. In one third of the libraries surveyed, the availability of online indexing has led to the cancellation of titles in paper copy. In many instances, multiple copies of indexes have been eliminated, especially expensive titles in the sciences. If online searching is free to patrons, perhaps it is not always necessary to retain paper indexes. Finally, some libraries reported that the impact of CD-ROM availability is greater than that of online services. For further information on the training of end users, see SPEC Kit #122, "End-User Search Services," March 1986.

Several libraries report the installation of tape copies of databases on university mainframe computers. This provides free search access for all patrons. If this becomes a trend, online searching will undergo more dramatic changes in the future but it seems unlikely that mediated online services will disappear entirely. The cost of local database load versus the expected use will mediate against its use in most instances. At the very least, librarians will be responsible for organization and training. Efficient and cost-effective online search capabilities will, in all likelihood, continue to be important to academic librarians and library users.

The SPEC Kit on Computerized Bibliographic Searching (#154, May 1989) contains SPEC survey results, job descriptions, evaluation procedures, policy statements, guidelines, and a selected reading list.

***

This flyer/kit was prepared as part of the OMS Collaborative Research/Writing Program.

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Computerized Online Bibliographic Searching in ARL Libraries

Kit #154
May 1989

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In addition to the publication of SPEC Kits, the Office of Management Services helps academic and research libraries increase their effectiveness through specialized training programs designed to improve staff competence. The OMS Training and Staff Development Program was developed in 1973, and since that time more than 7,000 librarians have participated in its programs.

Six different management institutes are offered, each geared toward preparing librarians to operate more effectively — both as individuals and as part of the library team.

BASIC LIBRARY MANAGEMENT SKILLS INSTITUTE: *The Manager*

This 3½-day institute focuses on the individual's relationship to the library organization, and to others within the organization: subordinates, peers and upper management. Through self-awareness tools and learning experiences, participants have an opportunity to reflect on their current approach to managerial and supervisory responsibilities. The institute also systematically introduces and reviews a range of concepts and techniques associated with effective management. The goal is to broaden the manager's ability to function in his or her role and to contribute to the organization as a whole.

LIBRARY ANALYTICAL SKILLS INSTITUTE

Today's libraries are much larger and more complex than those of twenty or even ten years ago. This growth has created intense competition for resources. In response, library managers recognize a need to approach organizational problems more analytically and creatively. This 3½-day institute is designed to strengthen the skills needed to observe, diagnose and take the actions required to create substantive, meaningful change in library operations and organizations. These skills are necessary for sound decision-making and planning and essential for making a case for financial support, demonstrating accountability, evaluating operations, understanding user needs or measuring user satisfaction.

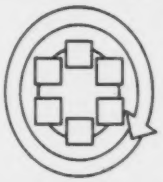
CREATIVITY TO INNOVATION WORKSHOP: *Breaking the Bonds of Traditional Thinking*

This 2½-day workshop is designed to improve library effectiveness through the application of creative problem-solving strategies to library concerns. The workshop will focus on both individual and organizational aspects of creativity. Participants will develop an understanding of personal strengths and have an opportunity to build skills in using individual and group techniques in organizational problem-solving. Factors which contribute to a climate for creativity and innovation will also be studied.

ADVANCED LIBRARY MANAGEMENT SKILLS INSTITUTE: The Management Process

The Advanced Institute, a 5½-day program, focuses on the individual's ability to have a positive influence on the overall performance of the organization. Through simulation of a library organization, participants are able to observe the effects of various interventions on the system as a whole. This institute emphasizes skill-building in observing, diagnosing, and planning for solving organizational problems and for capitalizing on organizational opportunities.

MANAGING THE LEARNING PROCESS INSTITUTE



Library administrators recognize that staff development plays a crucial role in the ongoing effectiveness of individuals within the organization. Because resources are scarce, administrators need to get the most from their training dollars. This 3½-day institute is designed to provide a conceptual framework for the provision of training, as well as methods and techniques to carry out the work. With this knowledge and these skills, library staff can make better judgments about what kind of training will have a significant impact on library operations. This program can also form the basis of an inhouse training program at their home institution.

RESOURCE MANAGEMENT INSTITUTE: *Financial Skills for Librarians*

Recognizing that there are as many systems for monitoring and allocating financial resources as there are libraries, the primary goal of this institute is to help library managers make more sound resource decisions using financial tools which are already available. This 3½-day institute explores the actual and potential roles of financial management systems in improving organizational performance The annual budget cycle will provide the context for managers to understand their contribution to the library's ability to make informed choices about the use of its resources.

Individuals interested in these programs should contact the OMS Office Manager at:
1527 New Hampshire Avenue, N.W., Washington, D.C. 20036, (202) 232-8656.

SPEC SURVEY RESULTS

February 9, 1989

TO: SPEC Liaisons

FROM: Susan Hocker, OMS Collaborative Research-Writer

RE: New SPEC Kit on ONLINE SEARCH SERVICES

Since SPEC Kit #76, Online Search Services was published in 1981, many new issues have become important. We are gathering information for a 1989 SPEC kit and flyer on online search services.

As an ARL academic library, you are asked to complete the enclosed survey covering organization, evaluation, impact, patron relations and services offered by the library's online service.

If you wish to provide information about multiple search locations with differing practices or policies, feel free to copy the survey and forward to the appropriate persons for response. However, we do not need a complete picture of your library's online searching activities for the flyer/kit.

Along with the completed survey, enclose policies, guidelines, forms, job descriptions and so forth that pertain to online searching issues and concerns.

Mail by March 13, 1989 to:

Susan E. Hocker
Louisiana State University Libraries
Reference Department
Baton Rouge, LA 70903

PHONE: (504) 388-8264 or (504) 388-8875

NAME: 83 ARL Academic Libraries

TITLE: _____

LIBRARY: _____

PHONE: _____

ORGANIZATION

1. How is the library's online search service organized?
   - 8 Separate search department
   - 88 A part of reference department
   - 3 Other (Briefly describe or enclose documents)

ENCLOSE ORGANIZATION CHARTS AND JOB DESCRIPTIONS

EVALUATION

2. Does the library conduct evaluations of the online service and/or searchers?
   - 52 No
   - 48 Yes

   If YES, check ALL that apply.
   - 27 Evaluation by patrons
   - 5 Evaluation by peers
   - 28 Evaluation by supervisor
   - 2 Other (Briefly explain or enclose documents)

ENCLOSE POLICIES AND FORMS USED FOR EVALUATION.

PATRON RELATIONS

3. Does the library charge for online searches?
   - 6 No
   - 94 Yes (If YES, send copy of policy.)

4. Are non-university patrons eligible to use the online search service?
   - 25 No
   - 75 Yes (If YES, send copy of policy.)

5. Does the library have policies on any of the following? Check ALL that apply.
   - 21 Limitations on library's liability for promptness or completeness of search
   - 8 Information for patrons on limitations of liability from vendors or producers
   - 13 Information for patrons on copyright restrictions on the use of search results
   - 2 Other policies of interest: *"Confidentiality"*

ENCLOSE POLICIES OR FORMS USED FOR LIABILITY OR COPYRIGHT INFORMATION

IMPACTS

6. Have the use and availability of online services resulted in the cancellation of, or decision not to purchase, any paper copies?

67 No
33 Yes If YES, which titles?

SERVICES

7. Does the library download searches using a microcomputer?

12 No
88 Yes

If YES, do you do any post processing of downloaded searches?

76 No
12 Yes

If YES check ALL that apply:

1 Add university call numbers or locations
3 Eliminate duplicate citations
12 Improve the appearance of final product
1 Other (please explain)

ENCLOSE DESCRIPTIVE MATERIALS RELATING TO DOWNLOADING.

8. Does the library do searches at/or near the reference desk to answer factual or short reference inquiries (e.g., ready-reference)?

3 No
97 Yes

IF YES, who decides to run such a search? (Check ALL that apply).

97 Reference librarian decision
2 Patron decision
3 Other (Briefly explain or enclose documents) ***Staff & Referrals***

If YES, does the library charge for such searches?

97 No
0 Yes
____ Other (Briefly explain or enclose documents)

ENCLOSE DESCRIPTIVE MATERIALS USED WITH READY REFERENCE

9. Does the library use online search services for interlibrary loan?

69 No
31 Yes

If YES, who runs these searches?

19 ILL staff
18 Reference staff
2 Other (Briefly explain or enclose documents) ***Search Staff***

If YES, how are costs allocated for such searches?

7 Charged to ILL Department
11 Charged to Reference Department
2 Charged to ILL patron
13 Other (Briefly explain or enclose documents) ***Online Budget-8; Library-5***

ENCLOSE POLICIES OR DESCRIPTIVE MATERIALS RELATING TO ILL

10. Other comments on online searching issues/activities? Feel free to use the back of this survey, or to attach additional helpful documents.

Mail **with supporting documents** by March 13, 1989 to: Susan E. Hocker, Louisiana State University Libraries, Reference Department, Baton Rouge, LA 70903 PHONE: (504) 388-8264 or (504) 388-8875.

ADMINISTRATION/ORGANIZATION

IOWA STATE UNIVERSITY

COMPUTER ASSISTED REFERENCE SERVICES

Computerized literature searching has greatly changed the reference services provided by the Iowa State University Library's Information Services Department. Vast resources are now available to the librarian and patron through telephone lines and passwords linking microcomputers in the Library to large computers at remote sites with many data base files stored in them. More recent advances using laser disk technology now provide the opportunity for having some data bases available in CD-ROM right in the Library. The ability to select from these data bases only those items relevant to the question being asked provides a powerful tool for assisting patrons in finding answers to their questions. Online and CD-ROM search services have become essential components of the ISU Library's reference service.

Online search services utilize trained reference librarians as intermediaries between the patron and the data base. Online searchers are familiar with the available resources, protocols for communicating and interacting online, content and structure of specific data bases, and techniques for information retrieval. They attend workshops, training sessions, exhibits and conferences to enhance their searching skills.

The Library's Automated Retrieval Service (LARS), begun in 1977, provides individuals with comprehensive, in-depth coverage of the literature. LARS, primarily used by graduate students and faculty members, is operated on a cost recovery basis. The Service provides access to over 750 data bases through DIALOG, BRS, and STN.

In 1986, the Information Services Department instituted end user searching, a service where the library patron does the data base searching for him or herself. Data bases offered by BRS After Dark form the basis of the Searchline service. It is offered evenings and weekends, when the reference desk is staffed, at a reduced cost to the patron.

Until recently the strength of online services has been to support the needs of researchers. With the introduction of data bases for more popular sources, such as the IAC products (Magazine Index and National Newspaper Index) and the H.W.Wilson files (Readers' Guide, etc.), data base searching now has appeal to the undergraduate student as well. Subscriptions to the CD-ROM forms of these data bases make these resources available to all users at no charge.

End user searching and the purchase of CD-ROM products shifts data base searching from the librarian directly to the patron. The role of the reference librarian is moving from being an intermediary searcher to a teacher of skills in searching techniques. Bibliographic instruction, both through

presentations to classes and in one-on-one teaching at the reference desk, is becoming an increasingly larger component of the Information Services librarian's work.

Integration of computer assisted services is now a significant aspect of daily work performed at the reference desk. When appropriate to answer a reference question, it is important that computer-accessed sources be considered and not just used for a separate search on a specific occasion. The professional experience of the reference librarians enables them to decide when searching online is the appropriate technique. Many information needs are still best served by using a printed index, reference handbook, or directory. Data base searching at the reference desk can provide information from sources not available in the library or additional access points for corresponding printed indexes. Appropriate uses of online sources include retrieval of some factual information, brief bibliographies, or verification of incomplete citations.

IOWA STATE UNIVERSITY

MEDIATED ONLINE SEARCHING

All full-time Information Services Department librarians should have formal training in using at least one data base vendor. Initial training in BRS or DIALOG will be done in the Library by the Coordinator.

Additionally, all online searchers should receive training in specific data bases or updates from search vendors as required by changes in the vendors' services or by changes in the librarians' job assignment. Training sessions should be paid by the library administration. Librarians should attend training sessions as close to Ames as possible.

To maintain levels of quality and proficiency, all online searchers shoud conduct at least 8-10 fee-based searches a month in their assigned subject area(s).

UNIVERSITY OF WATERLOO

DEPARTMENT: WATMARS OFFICE

POSITION: Coordinator of Machine-Assisted Reference Services

INCUMBENT:

SALARY GRADE:

GENERAL ACCOUNTABILITY

The incumbent is responsible for developing and coordinating effective on-line information retrieval service for library users.

NATURE AND SCOPE

This position is one of five reporting to the Coordinator of Information Services. The others are the Heads of the Dana Porter and Davis Centre Reference and Collections Development Departments, the Coordinator, IBIS, one Library Assistant and the Secretary, Davis Centre Library Office.

As coordinator the incumbent is expected to work with the librarians in the Reference Departments to develop on-line services. The incumbent acts as search editor and develops appropriate training and monitoring programs for other librarians acting as search editors. She/he must be able to run searches on various systems. This requires familiarity with the services subscribed to by the Library and the data bases available. The incumbent must keep up-to-date with the latest developments where feasible. She/he insures that the members of the University community and potential users in the surrounding area are aware of the on-line service. The incumbent is also required to keep full records of the on-line activities in order that the service might be regularly evaluated and also in order that invoices can be prepared.

The incumbent manages the public CD-ROM workstations. He/she acquires expertise with the systems, ensures their proper operation and maintenance, develops training programs for both staff and users and evaluates their use.

The incumbent works closely with the Coordinator, IBIS in developing on-line search stategies and in providing back-up support to the IBIS operation.

The incumbent serves at the Davis Information Desk to answer general and specific reference queries and to instruct patrons in the methods of library research. This may require approximately ten hours per week.

From time to time, and especially during the fall term, the incumbent may conduct orientation tours of the Library and assist with workshops and other specialized orientation services.

SPECIFIC ACCOUNTABILITIES

1. To coordinate and develop the on-line information retrieval service at the University of Waterloo, and to represent this program throughout the region.

2. To carry out on-line searches.

3. To keep up-to-date with developments in the field of on-line searching, to train other search editors and to assume the chairmanship of the WATMARS Committee.

4. To publicize the service to the University and surrounding communities through such media as brochures, newsletters, and workshops.

5. To maintain financial control and records of the service.

6. To manage the public CD-Rom workstations.

7. To provide expertise and back-up to the IBIS operation

8. To provide reference service at the Davis Centre Information Desk and to participate in the orientation and publications programs.

9. To contribute to library planning by the timely and accurate reporting of developments or problems within the WATMARS Service which require special attention, by seeking solutions to these in consultation with the Coordinator of Information Services and others as appropriate, and by participating in the plans of the Library as a whole.

10. To undertake other responsibilities as assigned.

Revised: November 1988

University of Missouri - Columbia

Position Description

Title: Coordinator of Computer Based Reference Services and Reference Librarian

Classification: Librarian II and up

Administrative Unit: Ellis Reference Services

Responsible to: Assistant Head, Ellis Reference Services

General Function, Purpose, and Scope of Position

Responsible for the planning and coordination of the Library's computer based reference service (LITQUEST) which includes the library's fee-based and end-user search services serving the research and instructional needs of the University. Provides for the education and training of UMC librarians in conducting computer based searches, and participates in delivering reference service at the Central Reference Desk, regular library instruction, online searching and collection development.

Specific Duties:

1. Plans, coordinates, trains, schedules, promotes, and conducts computer based reference searches in conjunction with other reference librarians in Ellis and the branch libraries. Responsible for the dissemination of price schedules, holding searchers meetings and routing information on fee-based and end-user services.

2. Recommends new search service procedures and policies and publicizes them to university users. Handles vendor accounts, prepares statistical reports and serves as a resource person on new computer based reference sources and their acquisition and development.

3. Responsible for providing instruction on effective use of Litquest, Litquest/After Dark and CD/ROM indexes using BRS, BRS/AFTER Dark, Dialog, Knowledge Index and various CD/ROM indexes. Develops guides and handouts for the computer based reference services available at the library.

4. Provides reference services to library users at the Central Reference Desk.

5. Provides bibliographic instruction and training in the use of the library; develops printed guides and handouts.

6. Responsible for the collection development of materials relating to LITQUEST. May participate in collection development in other areas as well.

7. Performs other duties as needed or assigned.

Supervision

Received: Works under the general direction of the Assistant Head, Ellis Reference Services and for matters of planning and policy the Head, Ellis Reference Services.

Given: Supervises students assigned to monitor the CD/ROM indexes and Litquest/After Dark.

Qualifications

Education: MLS degree from an ALA accredited program; second masters degree preferred; education and training in the use of computer based reference sources including on-line, end-user and CD/ROM systems.

Experience: Two or more years experience using computer based reference sources including online, end-user and CD/ROM systems. Reference experience in an academic or research library desirable.

Skills and Abilities: Ability to relate to and communicate well with people of all levels of library expertise; ability to communicate well in writing; strong service orientation; ability to promote library services; creativity and initiative; must be able to work successfully as a team member. Must possess knowledge of computerized databases and be proficient using BRS, Dialog and CD/ROM indexes.

Revision Date: 6/88

Approval Signatures:

_____
Assistant Head, Ellis Reference Services

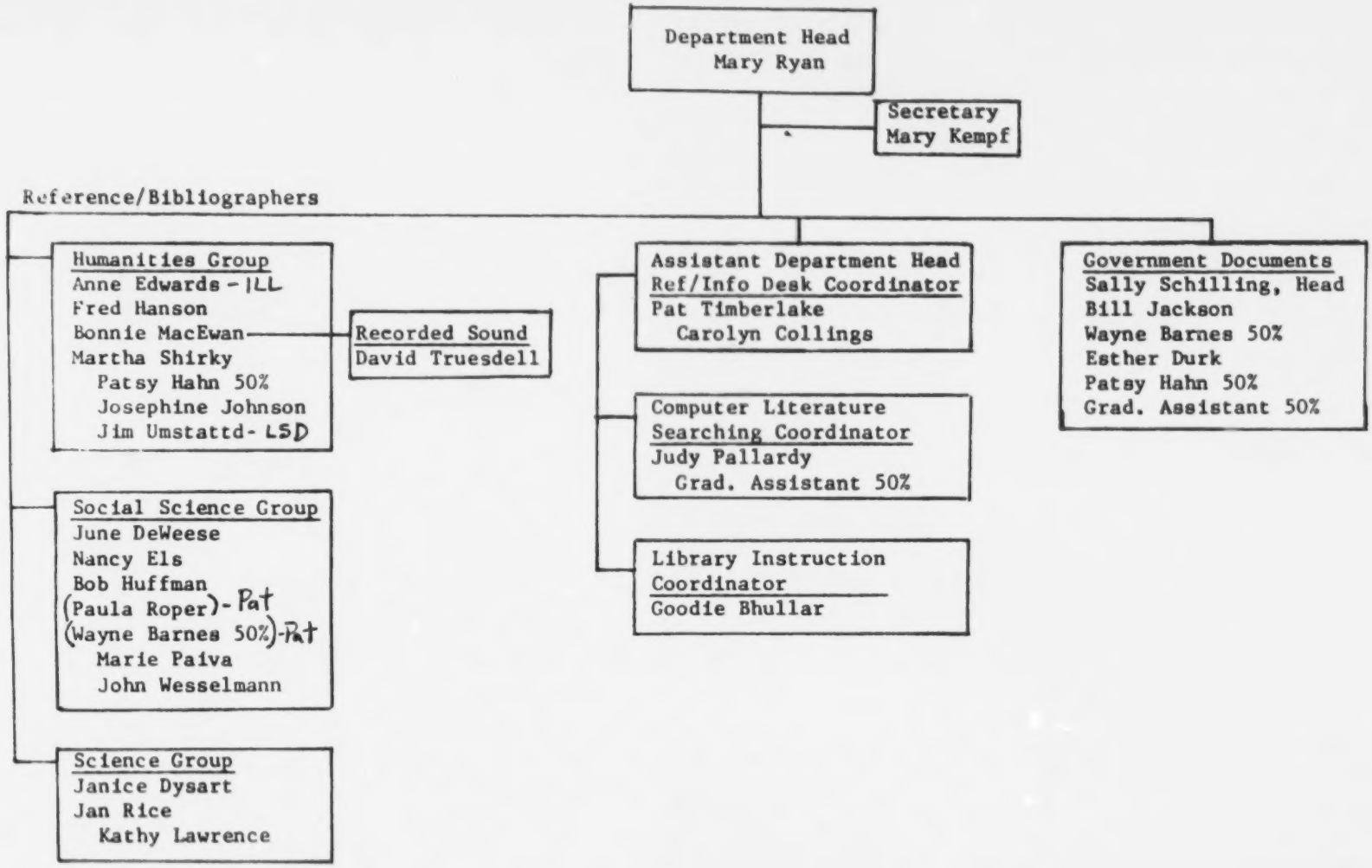
_____
Head, Ellis Reference Services

_____
Personnel Coordinator

_____
Director of Libraries

University of Missouri-Columbia

ELLIS REFERENCE SERVICES



December, 1987

JOB DESCRIPTION

Online Services Coordinator
University of Georgia Libraries

Coordinate online searching (intermediary and end-user) for the University Libraries' five search units: Main Library, Science Library, Veterinary Medicine Reading Room, Coastal Experiment Station, and Georgia Experiment Station

Supervise the day-to-day operations of the Main Library search unit which consists of: (1) the intermediary search service with its 14 searchers (ten in Reference and four outside of Reference); and (2) the end-user service (SHERLOCK)

Formulate online searching policies and procedures for the Main Library

Assign searches to Main Library staff

Perform searches

Advise intermediary searchers and end-user searchers

Check in search results and distribute them to searchers

Train intermediary and end-user searchers

Evaluate Main Reference intermediary searchers

Promote development of searcher skills through workshops and demonstrations

Maintain awareness of trends in the online field

Inform searchers and other library staff (as appropriate) of important developments in vendor systems and major databases

Schedule and present online demonstrations to university classes

Coordinate and assist in preparation of online instructional and promotional materials

Supervise a paraprofessional who logs searches, checks invoices, maintains payment records, submits receipts to the Business Office, and compiles statistics

Communicate with database producers and vendors

Prepare monthly and annual reports and special reports, e.g., cost recovery analyses

Develop forms and spreadsheets necessary for online operations

Order database search aids

REVISED JOB DESCRIPTION: DATA & INFORMATION SERVICES LIBRARIAN

STANFORD UNIVERSITY LIBRARIES

RESPONSIBILITIES

The Data and Information Services (D.I.S.) Librarian is a member of the General Reference Department and a key person in the Stanford University Libraries' provision of research support services. The position is responsible for making policy recommendations for the adaptation and integration of newer technologies into the univeristy libraries. The D.I.S. Librarian is a leading member of public services planning, development, implementation and review of programs and initiatives in support of electronic scholarship in the Stanford University Libraries.

The D.I.S. Librarian, in addition to scheduled general reference service, is responsible for planning, promoting and participating in the university libraries' program of automated services and online database searching. Elements of the program include: current awareness and evaluation of available and developing automated information services including databases in the humanities and the social sciences; general coordination and development of mediated and unmediated database services in the Stanford University Libraries including program review, oversight of D.I.S. accounts, vendor relations, and leadership of database searching; specific coordination, participation in, and development of an in-service instructional program for staff, as well as programs for automated services such as the online catalog, optical and CD ROM databases, machine-readable data files and other databases for faculty and students; and the direct provision of database searching for patrons.

RESPONSIBLE TO

Chief, General Reference Department

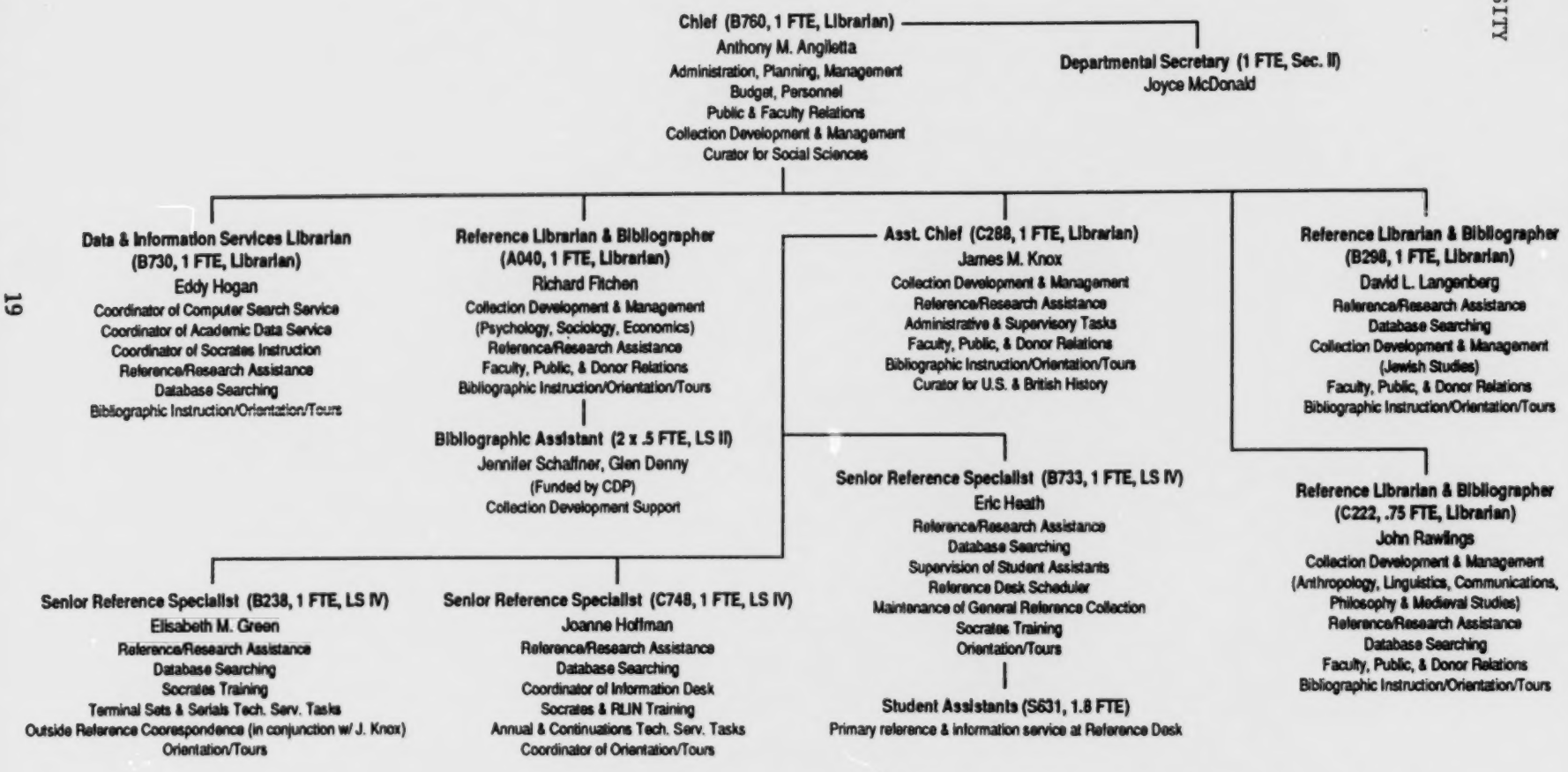
CLASSIFICATION

Librarian

2/88

STANFORD UNIVERSITY

GENERAL REFERENCE DEPARTMENT
FUNCTIONAL ORGANIZATION CHART



February 1989

ONLINE SERVICES

University of Wisconsin-Madison
General Library System

Organization

The Assistant Director for Reference and Information Services coordinates online services for the General Library System and is responsible for planning, policy recommendations, negotiation of contracts with online vendors for most library locations in the General Library System, arrangement of training opportunities, management of the online budget, and collection of statistics. The GLS Online Coordinating Committee, with representatives from the three largest libraries in the GLS and one from the smaller science libraries, works with the Assistant Director on many of these functions. In the future this committee will be known as the GLS Electronic Reference Coordinating Committee, as it also works with the Assistant Director on the selection and implementation of CD-ROM products. The Assistant Director and the Coordinating Committee work with the GLS Automation Office on the selection and installation of equipment.

Memorial Library, Steenbock Library and College Library--the three largest libraries in the General Library System--each have a coordinator of online services. Most reference librarians in these libraries are trained as searchers, and many paraprofessional reference staff are trained to do ready reference searching.

The professional libraries on campus--Health Sciences, Engineering, and Law--also operate search services, as do several research centers. These are managed by the individual libraries or centers. Searchers from all campus libraries and from corporate and public libraries in the community meet regularly in the Madison Online Users Group to exchange information.

COMPUTER-BASED BIBLIOGRAPHIC SEARCH SERVICE (COBBS)

Online searching of off-campus databases is an integral part of the reference service of all of the WSU Libraries. In order to coordinate this service, which reaches across library boundaries in terms of deployment and training of personnel and purchase of materials and supplies, the Director of Libraries has established the Committee on Computer-Based Bibliographic Search Service (COBBS).

Composition and Tenure:

The Computer-Based Bibliographic Search Service is composed of three COBBS coordinators (one each from Hum/Soc/Ed, Science/Engineering, and Vet Med/Pharmacy), who hold appointments based on their continued service as a Database Coordinator in their respective areas of representation. The Systems Librarian serves as ex officio chair of COBBS and as the Director's Council liaison and the principal administrator of the COBBS budget.

Responsibilities:

Committee:

The charge of the COBBS Committee is to:

1. Plan and coordinate the system-wide development of this service, including:

    a) assessment of present and future areas of patron need
    b) assessment of the Libraries' capabilities to meet those needs
    c) training of searching personnel, including continuing education of searchers
    d) education of users and potential users of the service
    e) liaison with vendors and publishers, including contracting for services and products
    f) evaluation of the quantity and quality of online search services
    g) maintenance of records and statistics

2. Formulate and recommend policies and procedures relating to the service.

3. Prepare and submit an annual budget request to the Director of Libraries.

4. Transmit information concerning the service to the Libraries' staff and patrons through appropriate means.

5. Develop guidelines for the evaluation of individuals performing online searching.

COBBS Coordinators:

The responsibilities of the COBBS Coordinators include:
1. Coordinate all database searching activities within their respective libraries.
2. Monitor policies and procedures related to searching within their libraries.
3. Act as liaison with vendors and producers.
4. Organize and preside at divisional meetings of database searchers.
5. Train new searchers as requested or necessary.
6. Maintain collection of database manuals, newsletters, etc.
7. Handle SDIs, billing information, receive printouts, hold demonstrations, act as trouble shooter, monitor supplies.
8. Prepare preliminary budget requests for respective libraries.
9. Work with Systems Librarian in administering the COBBS budget allocation.

Systems Librarian:

The responsibilities of the Systems Librarian include:
1. Organize and preside at meetings of COBBS.
2. Prepare budget requests for database searching.
3. Monitor and administer COBBS budget allocation.
4. Act as liaison with vendors and producers.
5. Serve as liaison with Director's Council.

Meetings:

COBBS meetings:
Meetings of COBBS should be held once a month or as necessary as determined by the Systems Librarian and/or the COBBS Coordinators. COBBS meetings are business meetings with informational and other activities (e.g. demonstrations) to take place at library-level meetings. COBBS meetings will be open meetings unless otherwide noted. Printed minutes, agendas, the annual budget request, and other official communications of COBBS are distributed to the Director, Director's Council, and Library Faculty.

Library-level meetings:
COBBS Coordinators should organize and preside at library-level meetings of database searchers where specific and detailed activities related to online searching should be addressed. Such library-level meetings should be held at least once a month to provide timely update information on database availability, training opportunities, searching techniques, and other miscellaneous information related to online searching. These meetings also should provide a forum for discussion of items to be addressed by COBBS or review of policies and decisions prepared by COBBS.

Reports to:

Director's Council via the Systems Librarian

UNIVERSITY OF SOUTHERN CALIFORNIA

CHARGE
OF THE
ONLINE COORDINATION COMMITTEE

The Online Coordination Committee is composed of eight members who are elected by the User Group. The AUL for Academic Information Services serves as an ex-officio member. Representation on the committee consists of one member from each of the three major searching units, Reference, Seaver, and Business; one member from Academic Information Services, and four members-at-large. For continuity members will serve on a revolving basis for a period of two years. The committee will elect a chair annually.

The charge of the Online Coordination Committee shall include such records management responsibilities as cost accounting, development and analysis of cost surveys, collection and analysis of use statistics as well as coordination of practice and dissemination of information on such issues as use of online access systems, professional training and end user training, and selection, use and availability of software and databases, relationship of public service units to the library satellites.

The committee reports to and recommends policy to the AUL for Public Services and acts as a liaison, as needed, between the AUL and the User Group. The committee disseminates information, solicits input from all online searchers in the U.S.C. Library System, and forms task forces.

UNIVERSITY OF SOUTHERN CALIFORNIA

CHARGE OF THE USER GROUP

The User Group consists of all online searchers in the U.S.C. Library System. Membership is automatic. The User Group meets to share information about searching techniques, database characteristics, and new developments in the field. The Group considers issues and recommendations brought to it by the Online Coodination Committee and, in turn, shall recommend areas of further study to the Committee. Database searching policy issues which arise within the User Group will be referred to the Online Coordination Committee.

The User Group annually elects from among its members a Coordinator whose responsibilities include calling meetings, coordinating activities of the Group, and acting as liaison with the Online Coordination Committee. The term of office will extend from September through August.

The User Group also elects four of its members each year to serve for two-year terms on the Online Coordination Committee. Terms of office will extend from September through August of the second year.

The process for electing the User Group Coordinator and the Online Coordination Committee will be determined by the User Group. At all times, however, the Online Coordination Committee must have on it a representative from each of the three major searching units--Reference, Seaver, and Business--and one member from Academic Information Services.

UNIVERSITY OF SOUTHERN CALIFORNIA

ONLINE SEARCHING REQUIREMENT FOR REFERENCE LIBRARIANS

At a minimum all reference librarians shall understand the concepts and techniques of online searching in order:

1. To aid patrons effectively in searching the databases on USCinfo

2. To know when a mediated online search is appropriate

3. To use commercially-available online databases

Therefore, all reference librarians shall be trained in online searching.

Online Coordination Committee
July 20, 1988

Agreed to by Public Service Council
July 20, 1988

.191 DEFINITION AND OBJECTIVES

UNIVERSITY OF SOUTH CAROLINA

ACCESS is a sub-unit of the main reference department of Thomas Cooper Library. ACCESS provides computerized bibliographic and information sources which support research and information needs at the University of South Carolina.

The objectives of ACCESS are to provide library patrons with needed computerized sources which are not available in printed reference sources and to provide computerized versions of many of the printed indexes and information sources which are owned by the library. Also, ACCESS seeks to enhance the reference department's ability to answer many reference questions which would be extremely difficult or impossible to answer using the library's printed resources. Computer searches shall be provided in the most efficient and effective manner possible.

.192 ONLINE SEARCH LIBRARIANS' RESPONSIBILITIES

A. Coordinator of ACCESS

The Coordinator of ACCESS is appointed by the Head of the Reference Department. The coordinator is responsible for performing database searches and supervising all ACCESS activities including the following:

-recommending ACCESS policies and procedures to the Head of Reference and making sure that they are followed.
-keeping the search tools up-to-date and weeding and recommending the purchase of new search tools when appropriate. Also ensuring adequate ACCESS office supplies are on hand and that searching equipment is in working order.
-maintaining all historical and current ACCESS files in an efficient manner so that they may be easily accessed.
-promptly reviewing the vendor invoices when they arrive to check their accuracy and the accuracy of the log, and to request refunds when appropriate.
-making monthly and annual reports of ACCESS activities including activities of historical importance such as demonstrations and training sessions attended as well as searching activities.
-making available to ACCESS searchers relevant training for updating skills and learning new strategies. This includes recommending that searchers attend training workshops either in Columbia or out of town.
-providing prospective and new searchers with in house and vendor training and following their progress closely. The coordinator will recommend to the Head of Reference when a prospective searcher should begin searching after an adequate period of training.
-being available for and receptive to consultation with other ACCESS searchers regarding computer searching and holding periodic meetings to ensure that all searchers are informed of new developments and to serve as a forum for discussion and continuing education about online searching.
-evaluating the ACCESS program and recommending to the Head of Reference any appropriate administrative changes deemed necessary. The coordinator must ensure that ACCESS activities work harmoniously with other Reference activities.
-evaluating the performance of the ACCESS searchers and communicating this information to the Head of Reference at least once a year prior to the general departmental evaluation period.
-recommending and conducting public relations activities on campus in support of the ACCESS program.
-maintaining awareness of new developments in the realm of online database searching by reading relevant literature and attending relevant online conferences and workshops when it is possible.

B. ACCESS Searchers

1. All ACCESS searchers are appointed by the Head of Reference in consultation with the Coordinator of ACCESS. When a member of the Library staff from outside of the Reference Department is considered for participation in ACCESS, the Head of Reference shall also consult with the appropriate department head and Library Administrator. All prospective searchers must cooperate with the coordinator during the initial training period prior to beginning regular searching activities. All searchers are responsible for the following:

-adhering to the policies and procedures set forth in this manual

and referring questions of interpretation to the coordinator.
-conducting database searches, including making appointments according to procedures, conducting interviews, formulating the strategy, adequately informing the patron about how the system works and the costs, performing the search, filling out appropriate paper work, ensuring that patrons are charged correctly and that they receive offline printouts after they have arrived, and helping patrons interpret their printouts.
-exercising professional judgement about when an online search should and should not be done and recommending alternate research strategies so that a patron is aware of his/her alternatives. If the searcher believes that to perform a search is either not practical or contrary to the patron's best interests, then the search should not be performed.
-maintaining proficiency at online searching by studying appropriate search aids and manuals, reading professional literature and attending relevant online workshops or conferences when possible.
-referring patrons to other institutions if that is in their best interests.
-placing database searching activities in the proper perspective with regard to other responsibilities in the Reference Department.

2. All of the responsibilities required of ACCESS searchers in .192B1 shall apply to participating librarians from departments outside of the Reference Department. Also, with regard to computer searchers from other departments, the following procedures shall apply:

Scheduling
-The schedule for all search appointments will remain in the Reference Department.
-The searcher shall block off times on the schedule to show when they are unavailable for an appointment.
-The coordinator may make an appointment for the searcher. The searcher may make his own appointments, but he must call or come to the Reference Department to make sure that the ACCESS office is not scheduled and to have the appointment put on the schedule.

Meeting the Patron
The patron may meet the librarian at the librarian's office or in the Reference Department, wherever the librarian desires; however, the librarian must come to the Reference Department to get the key to the ACCESS office.

Processing the Search
-All ACCESS files will be kept in the Reference Department, although small quanities of blank search forms or ACCESS publicity may be kept in the librarians department.
-All prints ordered by the librarian will be kept in the Reference Department.
-When prints arrive in the mail, the prints and patron forms will be put in a special box in the Reference Department, and the librarian will be informed that his prints have arrived.
-Patrons will pick up searches in the Reference Department.

Evaluation
The evaluation called for in .192A shall be communicated to the Head of Reference and to the head of the librarian's department.

.194 USERS

ACCESS is intended primarily for students, faculty and staff of the University of South Carolina campuses. Persons not affiliated with the university may use the service, but they will be charged higher fees.

REFERRALS

The reference department staff is urged to refer patrons to other institutions when another institution will serve their needs better. In particular, patrons who are neither associated with the university nor students or educators from other educational institutions should be referred to Richland County Public Library when it has the databases to serve them.

EVALUATION

S.O.S. Program
Questionnaire

STANFORD UNIVERSITY
GREEN LIBRARY

Please help us to evaluate the effectiveness of the Support for Online Searching program by answering this questionnaire as completely as you can. *When you are finished, it may be triple folded, stapled, and put into ID mail.*

First, a little about yourself:

Name: _____

Sex: M ___ F ___ Status: Undergrad ___ Grad ___ Major: _____

Have you ever had an online search done before? Y ___ N ___ If "yes," where?

At Stanford ___ At another academic library ___ At a public library ___ Other ___

Are you satisifed with the results of your S.O.S. search?

Very satisfied ___ Satisfied ___ Dissatisfied ___ Very dissatisfied ___ Don't know ___

If you were not satisfied, please comment:

_____

_____

What is your preferred method of research?

manual searches of indexes ___ online ___ other ___ combination of methods ___

What do you think the advantages of online searches are? (check all that apply)

faster ___ easier ___ more precise ___ greater recall ___

other (specify) _____

What are the disadvantages?

there is a fee ___ too much red tape ___ less precise ___ less recall ___

other (specify) _____

Would you like to do your own searches? Y ___ N ___ If "yes," please comment:

_____

_____

Would you be willing to be contacted for a more extensive interview regarding the S.O.S. program? Y ___ N ___ If "yes," what is your phone number? _____

Search No. _____

Searcher _____

We are interested in your evaluation of this computerized search. Your answers to the questions below will help us to evaluate Computer-Based Reference Services and the quality of our searching. Please take a few minutes to complete the form and return it to the Library whose address appears on the back.

1. Type of user: ___ UW Faculty/Staff
   ___ UW Graduate Student
   ___ UW Undergraduate Student
   ___ Other (please indicate) _____

2. Was this your first computerized search? ___Yes ___No
   If yes, how did you learn about this service?

3. Would you use this service again? ___Yes ___No
   If no, why not?

4. How helpful was the information and assistance given by the librarian who ran your search? ___very helpful ___not very helpful
   ___helpful ___not helpful at all

5. For your purposes in this request, did the result cover the topic?
   ___very well ___adequately ___not very well ___not at all

6. Was the bibliography you received:
   ___easy to interpret
   ___required assistance to interpret
   ___difficult to interpret

7. Please check below if your use of any of these library services has increased as a result of requesting a computerized search.

   ___Central Serials Record ___Reference Service
   ___Interlibrary Loan ___Periodicals
   ___Photocopying ___NTIS microfiche
   ___Other (please describe) ___ERIC microfiche

Comments:

4/81 rev10/83

NOTRE DAME LIBRARIES
DATABASE SEARCH SERVICE

1. Searcher_____
2. Library_____
3. Date_____

SEARCH EVALUATION

PLEASE TAKE A FEW MINUTES TO ANSWER THE FOLLOWING QUESTIONS TO HELP US IMPROVE THIS SERVICE. WHEN FINISHED, JUST FOLD AND STAPLE AND USE THE BACK OF THE FORM AS AN ENVELOPE.

Name (optional)_____

Status: _____ Department:_____

1. Was the information about the service and the assistance you received when you submitted the search adequate? _____Yes _____No

2. Was the time lapse between search request and receiving your search reasonable?_____Yes _____No

3. Did the search produce information pertinent to your topic? ____Yes ____No
If no, please specify:

4. Did you search printed sources prior to requesting a database search?
_____Yes _____No

5. Compared with searching printed sources, did the computer search produce:
_____More _____Less _____About the same number of references as you expected

6. Did the search results justify the expense? _____Yes _____No _____Partly

7. Were you able to obtain material cited in search results? ____Yes ____No
If yes, did you get material:
____On campus ____Interlibrary Loan ____Other. Please explain:

8. Would you use the service in the future? _____Yes _____No _____Unsure

9. Where did you learn about the Computer Search Service?
_____Librarian _____Printed Announcement _____Friend/Colleague
_____Other_____

10. We welcome any other comments about the service or about the search result you received. THANK YOU FOR YOUR COOPERATION.

EVALUATION OF COMPUTERIZED INFORMATION SERVICE

LITERATURE SEARCH

1. HOW DID YOU LEARN ABOUT THE COMPUTERIZED INFORMATION SERVICE?
   ☐ Friend, Prof., Lib. Staff, etc. ☐ Literature ☐ Signs, Labels
2. THE RESULTS OF THE SEARCH WERE:
   ☐ Excellent ☐ Very good ☐ Adequate ☐ Unsatisfactory
3. ESTIMATE COST OF SEARCH IN RELATION TO THE VALUE OF THE SEARCH:
   ☐ Very expensive ☐ Expensive ☐ Reasonable ☐ Very Reasonable
4. WOULD YOU RECOMMEND COMPUTERIZED INFORMATION SERVICE TO OTHERS?
   ☐ Yes ☐ No
5. IF YOUR ANSWER TO #4 WAS YES, HAVE YOU DONE SO?
   ☐ Yes ☐ No

COMMENTS:

KENT STATE UNIVERSITY LIBRARIES

PS-2946 3/79

WASHINGTON STATE UNIVERSITY

D. Online Searching

Demonstrates competence in searching national online services and databases (e.g., DIALOG, BRS, MEDLARS). [These criteria do not apply to local, regional or national online library systems, such as COUGALOG, WLN, or OCLC.]

1. Interprets user requests and questions correctly, including clarifying nebulous concepts and determining appropriate language for the search.
2. Demonstrates competence in determining and communicating to the user whether the request can best be filled by a librarian-mediated search, an end-user search, or by use of resources other than the computer. This includes communicating the likely costs in time and money of all approaches.
3. Demonstrates expertise in selecting the appropriate online system(s) to be used, and within those, the appropriate database(s) to be searched.
4. Demonstrates competence in executing the search by using the most efficient commands and features of the system(s)/database(s) searched.
5. Demonstrates competence in composing a search that retrieves the best available information for the user.
6. Demonstrates a willingness to assist the user in interpreting the search results.
7. Keeps up with changes in systems and databases.
8. Maintains cooperative relations with library faculty and staff.

E. Bibliographic Organization and Control

Demonstrates competence in establishing and maintaining bibliographic systems that facilitate the organization and control of library resources.

1. Demonstrates in-depth knowledge of past and present cataloging rules.
2. Competently applies currently accepted cataloging rules to produce high quality cataloging for all types of materials.
3. Demonstrates comprehensive knowledge of classification tables and subject heading schedules.
4. Demonstrates competence in the use of automated library systems and knowledge of current developments.
5. Demonstrates sensitivity to the needs of library users.
6. Maintains cooperative relations with library faculty and staff.

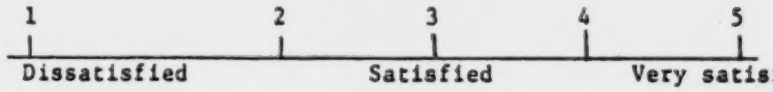
UNIVERSITY OF KENTUCKY LIBRARIES
DATA SERVICES

SEARCH NO. _____

LITERATURE SEARCH EVALUATION

PLEASE TAKE A FEW MINUTES TO EVALUATE DATA SERVICES. WHEN FINISHED JUST FOLD THIS IN HALF AND PUT IT IN THE CAMPUS MAIL OR RETURN IT TO THE REFERENCE DESK AT THE LIBRARY. THE ADDRESS IS PRE-PRINTED ON THE REVERSE SIDE. THANK YOU FOR HELPING US TO IMPROVE THIS SERVICE.

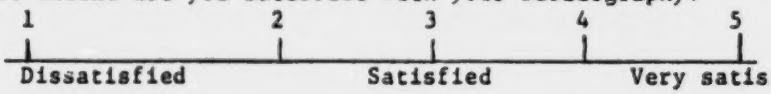
1. To what extent were you satisfied with the assistance provided by the search analyst?



If less than satisfied indicate why _____

_____

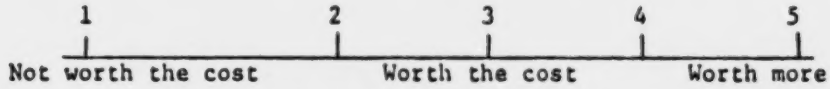
2. To what extent are you satisfied with your bibliography?



If less than satisfied indicate why _____

_____

3. How would you rate the value of the bibliography?



If not worth the cost explain why _____

_____

4. Which of the following was your primary reason for requesting a computerized literature search?

_____nature of the topic would have made a traditional search difficult or impossible
_____lack of time
_____need for comprehensiveness
_____other (specify)_____

5. If you have any additional comments or suggestions about the service, or the bibliography you received, please describe below.

UNIVERSITY OF GEORGIA

UGA ONLINE SEARCHER PERFORMANCE APPRAISAL PROCEDURE - MAIN REFERENCE

The appraisal process has two objectives:

To evaluate the overall quality of the searches performed

To show searchers methods of improvement or alternative approaches to searches

The performance appraisal period will be July through June to correspond with the UGA Libraries' fiscal year.

Searches will be reviewed every four months, with a rating done annually.

The Online Services Coordinator and the Assistant Coordinator will evaluate the searches and jointly arrive at an overall rating for the searcher. To maximize objectivity, each of the evaluators will alternately review the searcher.

Every four months the Online Services Coordinator and the Assistant Coordinator will choose three searches to review. The nine searches chosen for the year should be longer searches, showing modification. As a group they should represent a variety of databases and systems (BRS and DIALOG) and display the use of controlled vocabulary and free-texting.

The evaluators will pull the printout for each search. The searcher will be notified of which three searches have been chosen for review. The searcher will pull the request form and bring it to the review session.

The searcher will discuss what the user requested on the form and what he actually wanted. The searcher will explain why the database was chosen, how the search was structured, and what terms were chosen. The evaluator and the searcher will examine the search printout. The searcher will indicate what prompted the choice of strategy at each point. The evaluator will indicate improvements in the search and alternative strategies.

The evaluator will make written notes on each search.

After the third review session the Coordinator and Assistant Coordinator will discuss their notes on each search and determine a rating for each of the search behaviors on the rating form, placing an x at a certain point on the continuum. The SUMMARY RATING will be an average of the six search behaviors.

The Coordinator will prepare the appraisal form.

The Coordinator will meet with the searcher and discuss the ratings given.

The Coordinator will modify a rating if necessary.

A copy of the appraisal form will be given to the Head of Reference and to the searcher.

UNIVERSITY OF GEORGIA - MAIN LIBRARY

1988 ONLINE SEARCHER PERFORMANCE APPRAISAL

Name: Rating period:

User requested searches performed:

****

OVERALL QUALITY OF WORK

1. Structuring of search (logical concept groups, positional operators)

Unsatisfactory	Satisfactory	Good	Outstanding

2. Use of sufficient index terms, including term permutations and synonyms

Unsatisfactory	Satisfactory	Good	Outstanding

3. Knowledge of database features

Unsatisfactory	Satisfactory	Good	Outstanding

4. Knowledge of system commands

Unsatisfactory	Satisfactory	Good	Outstanding

5. Appropriate modification of searches (narrowing, broadening)

Unsatisfactory	Satisfactory	Good	Outstanding

6. Accuracy of term and command input

Unsatisfactory	Satisfactory	Good	Outstanding

***** SUMMARY RATING *****

Unsatisfactory	Satisfactory	Good	Outstanding

Comments

****

INITIATIVE (towards improvement of search performance)

Unsatisfactory	Satisfactory	Good	Outstanding

Comments

****

Other online activities (workshops, demonstrations, publications)

USER ELIGIBILITY/CHARGES

UNIVERSITY OF PITTSBURGH

UNIVERSITY LIBRARY SYSTEM

POLICY STATEMENT:

COMPUTERIZED DATABASE SERVICES

I. Policy

A. The libraries of the University Library System will select and make available within budgetary limitation, access to those databases that support the instructional and research needs of the University. Searches[1] for members of the University of Pittsburgh will be the first priority.

The University Library System will be responsible for the training of personnel to perform this function.

Passwords are confidential and should be known only to the head of the unit responsible for database searching and the database searcher. Passwords should not be written down in obvious view, or posted; or divulged to any other librarian, staff, faculty or student.

B. Members of the University: The option to utilize a library-subsidized database search will be within the purview of the involved librarian(s). No fees will be charged for searches performed for members of the University community.[2] Students are limited to three subsidized course-related searches per term and, at the discretion of the librarian, a limitation may be placed on the number of citations printed per person over a particular length of time. The University Library System may, as time permits, perform additional searches paid for by the patron. SDI's (Selective Dissemination of Information) will not be done for undergraduate students. Patrons will be encouraged to seek database searches from the librarian responsible for the subject area most appropriate to his/her search. Instructors who would like their students to study the process of database searching are encouraged to seek counsel from a librarian. It is not the intent of the University Library System to do subsidized database searching solely for the study of the process.

C. Outside Requests: For persons outside the University, a fee will be

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[1] A search is defined as access by computer to as many databases as the searcher considers necessary to answer the question.

[2] See Section II, page 2-3.

1/89

charged for searching. Determination of whether or not to perform searches for non-University persons will be made on a case-by-case basis.

D. Intermediary searchers and library clients will not perform an online search of a database if the disc equivalent is in the immediate library and operational. Even if the disc equivalent is off-site, intermediaries are encouraged to advise requestors to utilize the disc equivalent database, whether the user searches the disc directly or the request is channelled through the intermediary to a searcher at the library housing the disc.

Intermediary searchers may perform an online search if:

1. the disc is in another ULS Library;

2. the subject/concept cannot be effectively searched with the disc's software;

3. the request involves several online databases;

4. the requestor has disabilities which hinder their ability to perform their own search;

5. the requestor is a faculty member;

6. the requestor needs information from a portion of the database that is not on disc (i.e., most recent,older).

II. Search Categories and Charges

A. No fee:

University of Pittsburgh:

-Student
-Faculty
-Staff
-Trustee
-College Over 60
-Faculty emeritus
-Field instructor
-Visiting professor/researcher
-Engineering Impact Program
-Upward Bound

B. 100% of the estimated cost of the search:

-Additional searches done for students who have exceeded their limit
-Faculty family
-Falk School students
-Nationality Rooms
-PCHE cross-registered student
-Special Library Card holders

C. 100% of the estimated cost of the search plus a $10.00 consultation fee:

-Individuals not in catagories A or B, including library I.D. card holders for Alliance Francaise, Informal Program, Chatham Tutorial, Medical, PRLC; and non-profit organizations.

D. 100% of the estimated cost of the search plus a $25.00 consultation fee:

-For-profit organizations

III. Submitting Requests

A. Recording User Information:

1. All requestors must fill out the University of Pittsburgh Libraries Database Questionnaire (Attachment A).

2. All forms are to be sent to the Database Searching Department (G-7 Hillman Library) when the search is complete.

3. At frequent intervals the Database Searching Department will distribute a master list of the number of searches performed for database services clients.

B. Recording Search Information:

1. Each entry into a database is to be entered on the Database Log (Attachment B).

2. There should be a separate log sheet for each vendor.

3. All log sheets will be forwarded to the Database Searching Department on the first of each month.

IV. Charging of Fees

A. Cash payment

1. All cash and checks are to be recorded on "University of Pittsburgh Libraries Daily Summary of Cash Receipts and Refunds" (Pitt-192 6177-872, Attachment C) and forwarded to Administrative Services (271 Hillman).

   a. In Hillman, the Database Searching Department searcher will fill out a University of Pittsburgh Invoice (Pitt 1900-2(1084), Attachment D)

   b. Searches done at Hillman Library must be paid for at the Hillman Lending Desk.

   c. The Hillman Lending staff will record the amounts on the Daily Summary of Cash Receipts and Refunds.

2. Checks must be made payable to "University of Pittsburgh".

3. Payment may be made at end of search or as soon as the full cost is known. Payment must be received before search results are given to the user.

B. Department Charges

1. Searches to be charged to research account numbers (numbers beginning with 5; eg. 5-xxxxx-xxx) are to be supported by a letter of authorization (authorization by department heads or deans) and attached to log sheet to be forwarded to the Database Searching Department. The authorizations will be kept on file in Administrative Services. Only one authorization is needed per fiscal year.

2. Searches on University account numbers (numbers beginning with 2, 3 or 4; eg. 2-xxxxx-xxx) do not need authorization. Enter the account number on the log sheet.

3. IDC forms will be prepared by the Database Searching Department to accompany the appropriate invoices.

University of British Columbia Library
Policies and Procedures

R Reference Services
Directive #2b
Issued by: Administration
Effective Date: October 1981
Cancels Directive #2a

COMPUTER-ASSISTED BIBLIOGRAPHIC SEARCHES

Charges to on-campus users, i.e. UBC faculty, staff, and students, for searches related to UBC research the cost of the transaction will be shared by the user and the Library as follows:

UBC staff time and equipment costs	paid by the Library, no charge to user.
Cost of computer connect time communication costs, royalties, and cost of off-line printouts (dependent on data base and carrier charges).	paid by the user (as charged by the data base supplier - minimum billing amount: $2.00)

A limited search may be undertaken for UBC students at a special flat rate of $10.00. A student who chooses a full search will pay the entire cost charged by the data base supplier.

Charges to off-campus users, and for those searches that are not related to UBC research; in both cases the total cost of the transaction will be paid by the user and calculated as follows:

UBC staff time up to one hour (including initial interview)	$ 30.00
Additional UBC staff time (charged in half hour increments)	$ 30.00 per hour
Cost of computer connect time, communication costs, royalties, and cost of off-line printouts (dependent on data base and carrier charges)	as charged by the data base supplier
UBC equipment costs	$3.00 per hour (in half hourly increments)

Indexed under: Computer Assisted Bibliographic Searches

Bibliographic Searches, Computer Assisted

55

RUTGERS UNIVERSITY LIBRARIES

Rutgers Online Automated Retrieval Service (ROARS) Policy

A. General Statement

Rutgers Online Automated Retrieval Service (ROARS) is a computer-assisted online information retrieval service offered by the Rutgers University Libraries. ROARS searches are performed on a fee-for-service basis and are partially subsidized by the University Libraries. The Libraries participating in ROARS are: Alexander, Camden, Dana, Kilmer, Douglass, Math, Microbiology, LSM and the Center for Alcohol Studies.

B. Eligibility

1. The primary community to be served by ROARS consists of current students, staff and faculty, faculty emeritus and the following University affiliates: the current students, faculty and staff of the University of Medicine & Dentistry of New Jersey-Rutgers Medical School and the New Jersey School of Osteopathic Medicine.

2. ROARS search privileges are also extended to individuals through their membership in groups which have local cooperative agreements and special arrangements with Rutgers University for library services. Eligibility through these agreements applies only at the unit library where the local agreement is in effect.

   Included in these special groups are the following:

   New Jersey Institute of Technology (Dana, Newark)
   Essex County College (Dana, Newark)
   New Jersey physicians at hospitals affiliated with the University of Medicine & Dentistry of New Jersey-Rutgers Medical School or the New Jersey School of Osteopathic Medicine (Science & Medicine)
   Stonier Banking Institute (Alexander)

3. ROARS is not available to:

   Rutgers alumni
   alumni of the University of Medicine & Dentistry-Rutgers Medical School
   alumni of the New Jersey School of Osteopathic Medicine
   corporate borrowers
   former university students (not alumni)
   unaffiliated scholars or researchers
   visiting faculty attending short-term institutes at Rutgers.

   These individuals will be referred to the New Jersey Occupational/Consumer Resource Center or other search services for their search needs.

4. Searches for library faculty in support of professional research are treated as other faculty searches, that is performed on a cost recovery basis.

5. A budget will be specifically allocated, however, for searches that are inappropriate to charge either to the user or to Ready Reference searching. In these cases, costs related to system maintenance, searcher updates on news, etc., should be accounted for by ROARS coordinators. Searches for administrative, job related or SIG or committee generated reasons should be authorized, in brief written form, by the appropriate Unit Librarian or chairperson and noted in monthly statistics reports. The Online SIG will monitor use of the funds to determine an annual figure. $150 is the estimated figure for 1983/84.

C. Database Coverage

Generally, each Rutgers library will handle search requests which fall within the scope of its collections. Regardless of where the original search request is made, referrals should be made among units taking into account the availability of expertise in a database at a particular unit and the proximity of a requestor's office or place of residence.

D. Search Responsibility

All ROARS searches are performed by librarians at Rutgers University who have been trained for database searching.

End users are not permitted to perform searches on ROARS terminals for several reasons: the difficulty of monitoring the costs of these searches and in computing the service fee for librarians who would be consulting, the loss in control of equipment and passwords and the fact that the University makes available terminals which can be used by students to access commercial vendors.

E. Search Charges

1. These direct costs of a ROARS search are passed on to the search client:

Vendor's per minute database charge	variable
Tymshare, Telenet or Uninet communication charge	variable
Offline print charge	variable

In addition, a service fee is added.

Service charge	$12.00/hr. or $.20/min. of online time

The University Libraries absorb the costs for general overhead and searcher's time devoted to search strategy and conducting searches.

2. Searches can be paid for by cash, personal check, through grant or departmental account funds or blanket account funds; billing options are available. Uniform accounting procedures are established system-wide. All searches and attendant costs are reported monthly by ROARS Coordinators to the Assistant University Librarian for Public Services on forms provided. See Appendix II.

EXTERNAL USERS & IBIS

1. DEFINITION

External users of WATMARS are those who are not currently enrolled as students at the University of Waterloo, UW staff or faculty.

Examples of external users are UW alumni, local residents (even if they hold a current Community Borrowers Card), or staff of the Innovation Centre. Conference attendees are considered external.

Covered as internal users are such people as part - time students, students on work terms, visiting faculty, and correspondence students.

An adjunct faculty may be considered internal if he pays by University of Waterloo account number or cash. If he wants to be invoiced he is considered external and is charged the extra fee.

***When in doubt about the status of those in 'grey areas', eg. such people as adjunct faculty and others who do not fit in the above descriptions.

- If the patron wishes to be billed he will be looked after by IBIS and charged.
- If he has an account number to charge the search to he can be treated as internal.

Students registered at another institution will be charged the minimum fee of $15 plus the cost of the search. They must pay cash at the time of the search. Students wishing their search to be billed to a company are invoiced by IBIS and are charged IBIS fees.

External users, except students, will be billed by IBIS.

2. COSTS

As of May 1, 1985, external users of WATMARS are charged the cost of the search plus $50.00/hr. with a $15.00 minimum according to the IBIS fee schedule.

3. PROCEDURE

a. If a search editor is the first person contacted

Upon contact with an external user wanting a search put that person in touch with the IBIS Coordinator who can explain the services available to the patron and the associated costs. If the IBIS Coordinator is unavailable contact the backup, the WATMARS Coordinator. The patron may still be referred back to you for the search, especially if the subject can best be handled by you.

Non UW students need not be referred to the IBIS Coordinator.

b. If the IBIS Coordinator is contacted first

You may also be contacted by the IBIS Coordinator to perform a search, or to assist with a search if it involves your area of subject expertise. Please keep in mind that IBIS requires fairly prompt handling when setting a time to run the search. You may want to contact the requestor by phone before running the search.

4. TIMEKEEPING & BOOKKEEPING

Keep track of the time spent from when you start working on the search for the patron. This includes checking thesauri, manuals, and explaining the printout. Record the information on an IBIS time chit and send it to the IBIS Coordinator with a photocopy of the logsheet. If you

feel the time does not accurately reflect the amount of time spent, indicate this, with reasons, on the time chit so that the bill may be adjusted.

The logsheet should be filled out as usual. The requestor will be "IBIS" suffixed with a customer code eg IBIS/JONES. The account number is 408-4580-39

5. OTHER SERVICES

For borrowers cards, loans, ILLs, etc., the patron should be referred back to the IBIS Coordinator. If he is going to find material in the Library himself and borrow it on his own card there may be no need to refer. He may receive assistance at the Information Desk.

6. PROBLEMS

Any problems are referred to the IBIS Coordinator.

TABLE 1
Estimates of IBIS costs @ $50.00/hr.

5 min	$ 4.17 *	25 min	$20.83		45 min	$37.50	
10	8.33 *	30	25.00		50	41.75	
15	12.50 *	35	29.20		55	45.85	
20	16.67	40		33.35	60		50.00

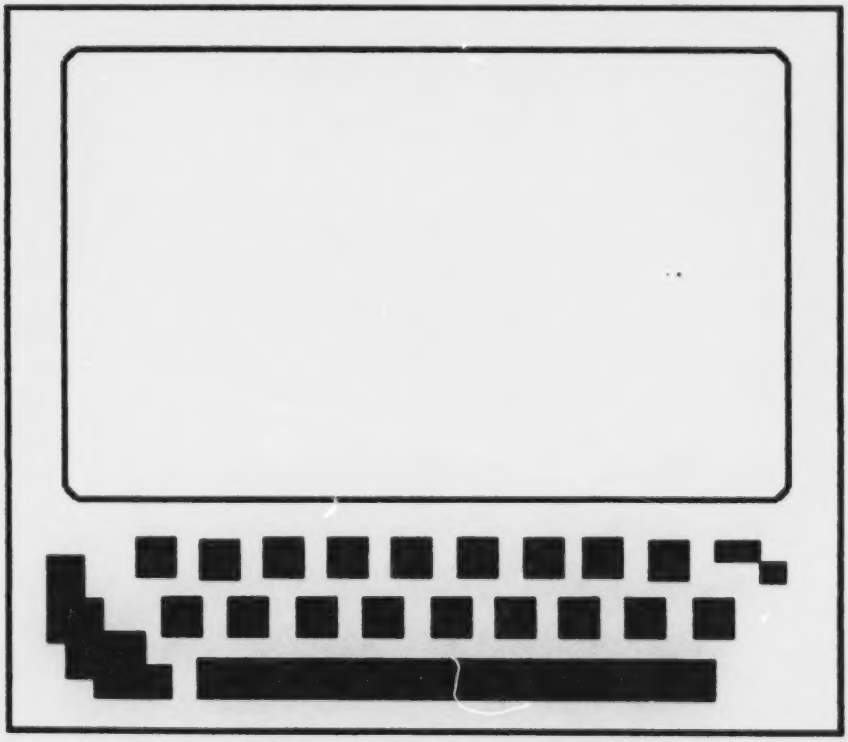
* $15.00 minimum

July 7, 1985

Now You Can Find the References You Need

Stanford University Libraries has introduced a new component of its Computer Search Service. The S.O.S. Program enables any qualified student to take advantage of low-cost online reference services.

The Program.
Support for Online Searching (S.O.S.) helps make it possible for you to have access to online, computerized sources of information for your research project. A skilled search analyst and you can collaborate on retrieving information for a flat fee of $5.



The Procedure.
To be a participant in this program you need to do these things:

- ☐ Discuss your research needs with a search analyst in a participating Stanford University Library.
- ☐ Have your professor certify that your research is related to academic work you are doing at Stanford.
- ☐ Attest to the fact that other funds are unavailable to you for an online search and agree to provide us with feedback after the search is completed.

Computer
Search Service

Stanford University Libraries

1/6/86

Computer
Search Service

**Stanford
University
Libraries**

S.O.S. Program Application

Name _____ Status: Undergrad ___ Grad ___

Department _____ Phone Number _____

I want to do an online search on the following topic:

_____

_____

_____

Limit in the following way(s):

By language: English only ___ Any language ___ These languages _____

By date: All years available ___ or specify date range _____

By format _____

By other criteria _____

I am interested primarily in: recall ___ precision ___

A search with good recall should retrieve all relevant materials, even though much might be irrelevant or marginally relevant.

On the other hand, a search with good precision should retrieve only relevant materials, even though some relevant and marginally relevant materials might not be retrieved.

It is impossible to achieve both good recall and precision in the same online search.

I have:

Discussed this search with a search analyst.

Signature of search analyst _____

Spoken with a faculty member, who certifies this search is related to my academic work in connection with an honors thesis, master's thesis, dissertation, or other significant research.

Signature of faculty member _____

By signing this form I certify that I do not have sponsored project or gift funds to support this search nor am I supported on a research assistantship. I also agree to pay the $5 fee incurred and to complete a short questionnaire upon receipt of the search.

Signature _____ Date _____

GRADUATE STUDENT SEARCH SUBSIDY PROGRAM

A database search subsidy is available to graduate students doing dissertation or thesis work. A maximum of $50.00 per search is available to those graduate students working in the social sciences and humanities.

In order to take advantage of this subsidy program, the student must complete a search request form (available at all University Libraries reference desk) and obtain an approval signature of his/her Dean, Director, Department Head, Advisor, or other Graduate Officer. The student then makes arrangements with a librarian to conduct the search.

Charges of up to $50.00 per search are paid by the Graduate School. If an individual search exceeds the $50.00 limit, the student is responsible for paying the amount over the limit. If it is later determined by the Graduate School that the student is not involved in thesis or dissertation work, the student will be responsible for the entire cost of the database search.

SUBJECT: Data Base Searches for Library Staff

Use of the Notre Dame Libraries' computerized literature search capabilities is available free of charge, under certain conditions, to members of the library staff. This privilege does not extend to routine reference work.

An annually determined amount of funds will be made available to the Data Base Committee for searches made for library staff members.

The Data Base Committee will determine who will receive free data base searches using the following guidelines:

1. A written request describing the project for which the search is to be made should be submitted to the Data Base Committee at least one week before the information is needed.

2. Two categories of subject search will be considered:

   a. Specific tasks which are directly related to the work or the program of the Libraries will receive first consideration. The maximum amount granted per request will be $50.

   b. Professional and scholarly research which is intended to lead to a publication or to a presentation at a professional or scholarly meeting will also receive consideration. Such grants will be available to library faculty and library associates and will be limited to $20 per request. Subject areas which qualify for such grants will be library science and those academic fields for which the prospective grantee has direct library responsibility.

3. A priority system which places individuals who have not received funds in any category in the year of application before those who have received support will be observed.

Approved by LAC 5/13/81

Index: Library Policies and Procedures
Data Base Searches for Library Staff

LIMITATION OF LIABILITY

UNIVERSITY OF BRITISH COLUMBIA
2075 WESBROOK MALL, VANCOUVER, B.C. V6T 1W5

COMPUTER BIBLIOGRAPHIC SEARCH REQUEST

INVOICE NUMBER **L-**

Cheques to be payable to University of British Columbia and payments sent to Finance Department | RECEIVED BY | DIVISION | PAGE/OF

NAME | DEPT

ADDRESS (CAMPUS OR OTHER) | PHONE

( ) FACULTY ( ) RESIDENT ( ) PHD ( ) MASTERS ( ) UNDERGRAD ( ) STAFF ( ) OTHER | LIBRARY CARD NO.

PAYMENT ( ) CASH ( ) CHEQUE ( ) CHARGE TO: NAME | ACCOUNT NO.

☐ I will pick up the search results at the Library
☐ Please mail the search results
LATEST DATE REQUIRED (ON LINE: MIN 3-4 DAYS / OFFLINE: MIN 7-10 DAYS) | DEPT. REQUISITION

AUTHORIZATION: IN REQUESTING THIS SEARCH I AGREE TO ACCEPT RESPONSIBILITY FOR ALL CHARGES AND AUTHORIZE THIS SEARCH AS
( ) UNIVERSITY USE - minimum charge $2.00 ( ) PRIVATE OR OTHER USE - minimum charge $20.00
I ALSO UNDERSTAND THAT THE UNIVERSITY AND ITS EMPLOYEES ARE PROVIDING A SERVICE OF AN ADVISORY NATURE WITH NO EXPRESS OR IMPLIED WARRANTY FOR RESULTS AND ASSUME NO OBLIGATION OR LIABILITY FOR DAMAGE ARISING OUT OF THE USE, OR INABILITY TO USE, THE INFORMATION RESULTING FROM THIS SEARCH.

SIGNATURE _____ DATE _____

REQUEST DETAILS: PLEASE USE SENTENCES TO DESCRIBE YOUR SEARCH TOPIC, ADD ANY KEY WORDS OR SYNONYMOUS TERMS WHICH MIGHT AID THE SEARCH ANALYST. LIST ANY KNOWN RECENT RELEVANT CITATIONS (INCLUDE AUTHOR, TITLE, COMPLETE JOURNAL REFERENCES).

DATABASE SUPPLIER / FILES SEARCHED	DATE SEARCHED	LOG ON / OFF	ELAPSED TIME	# PRINTS ON / OFF	SYSTEM CHARGE	COMMUN CHARGE	PRINT CHARGE	ROYALTIES	BACKFILES	U.S. EXCH	U.B.C. CHARGE	TOTAL
					$	$	$	$	$	$	$	$

OFFLINE BATCH NO. / REMARKS

TOTAL COST	
UBC REBATE	
INVOICE AMOUNT	$

SEARCHER	INVOICE DATE	UBC	NON UBC
		( ) CHARGE - ACCT NO ( ) CASH	( ) TO BE BILLED
DATE PRINTS RELEASED	PAYMENT REC'D DATE	_____ ( ) CHEQUE	( ) CASH
			( ) CHEQUE
		CREDIT ACCOUNT ( ) 79-8409-508	( ) 79-8409-606

FORM DF-4 (7/81)

LIBRARY 59 65

TEMPLE UNIVERSITY

PHILADELPHIA, PENNSYLVANIA 19122

SAMUEL PALEY LIBRARY

I understand Temple University cannot guarantee an absolutely error-free computerized literature search, and agree that Temple University and its employees have no legal responsibility with respect to the manner and results of any search. The undersigned hereby indemnifies, defends, and saves Temple University harmless from any and all claims, actions, and damages arising out of or relating to the above referenced computerized literature search.

_____

Signature of patron

INSTRUCTIONS FOR REQUESTER

Please read the statement concerning LIMITS OF LIABILITY printed below. Then COMPLETE the TWO FORMS provided:

1. SEARCH REQUEST FORM on reverse side. Necessary for billing and internal records.
2. SEARCH DESCRIPTION FORM. The information provided can expedite the pre-search planning, shorten the search time and improve the final result.
3. Be sure to SIGN the SEARCH REQUEST FORM.

The requester for a FeeSearch agrees to pay all charges and fees for the search. The cost is based on the length of the search, the charge for the use of a particular database and the number of citations obtained. There is also a surcharge for each search. Charges and fees apply for all searches whether or not the information developed is satisfactory. Payment may be made by cash, check or Case Western Reserve departmental account number.

The University Libraries or CWRU shall not be liable or deemed to be in default for any delays or failures in performance or interruption of service resulting directly or indirectly from any cause or circumstance beyond the reasonable control of CWRU or any failure to locate satisfactory data or information. Requester will indemnify and hold CWRU harmless against any claims or demands of third parties arising out of use of services or materials provided hereunder.

The University Libraries will provide search service of the DIALOG, BRS, or ORBIT in accordance with the User's Manuals. CWRU along with Information Retrieval Service, Information Technologies, and Pergamon Press, MAKES NO RESPRESENTATIONS OF WARRANTIES, EXPRESSES OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, WARRANTY OF MERCHANTIBILITY OR FITNESS FOR A PARTICULAR PURPOSE. University Libraries or CWRU will not be liable for incidental or consequential damages.

Reproduction is limited due to copyrighted data. No machine readable copies may be made for internal use or third party use. Reproduction of information must be limited to notes or the single copy provided by the printer.

Requester agrees to comply with any copyright notices or other limitations on use applicable to material or database(s) supplied herunder. Requester is responsible to observe limitations on uses and/or duplication of material retrieved from various special databases and, when necessary, to secure appropriate permission to query special and/or restricted databases (such as LISA or GEOREF), and to abide by the applicable rules for dissemination of such information.

CASE WESTERN RESERVE UNIVERSITY LIBRARIES
SEARCH REQUEST FORM

DATE OF SEARCH_____

NAME_____DEPT./ORG._____

BUILDING_____ _____ROOM NO._____EXT._____
OR
ADDRESS_____TELEPHONE_____

_____FACULTY_____STAFF_____GRAD_____UNDERGRAD_____OTHER

CHARGE TO FUND NO._____. PAID ON_____
(date)

ONLINE SEARCHING

System	Database(s)	Length of search	Type(s)	Cost
DIALOG	bl	_____hrs.	_____	$_____
_____	_____	_____hrs.	_____	$_____
_____	_____	_____hrs.	_____	$_____
_____	_____	_____hrs.	_____	$_____
_____	_____	_____hrs.	_____	$_____
	SURCHARGE:			$_____
	ONLINE TOTAL:	_____hrs.	_____	$_____

OFFLINE REQUESTS

System	Database(s)	Print(s)	Cost	Item no.
_____	_____	_____	$_____	_____
_____	_____	_____	$_____	_____
_____	_____	_____	$_____	_____
_____	_____	_____	$_____	_____
		OFFLINE TOTAL:	$_____	

TOTAL COST OF SEARCH
INCLUDING TYPES OR PRINTS: $_____

REQUESTER_____ SEARCHER_____

QUICK PW_____ FOR FEE PW_____

COPYRIGHT

Full-Service Online Search

Computer-based Information Services
The General Libraries • The University of Texas at Austin

Name _____
Address _____
Phone _____
University I.D. # _____
Department or Major _____

UT-Austin Status:
( ) Faculty
( ) Graduate Student
( ) Undergraduate
( ) Staff

Method of Payment: ( ) IDT: Department Name _____
Department Address _____ Phone _____
Account Number _____
Account Title (if known)_____

( ) Personal Check (# if known_____)

If search results are printed offline, pick up printout at: ( ) Photoduplication, PCL 1.402 ( ) Other library _____

Agreement: I hereby authorize the General Libraries to perform the online search/es specified on this form and agree to pay charges incurred for computer time, telecommunications, and printing, even if the search results in no relevant citations. If results are provided in machine-readable form, I acknowledge that such data may be protected by the copyright law (Title 17, U.S. Code) and by agreements with the online service vendor and/or database producer; I have received copies of applicable provisions and agree to abide by them.

Signature _____ Date _____

Staff Use Only

Searcher _____ Library unit _____ Date _____

Vendor	Database Name & Number	Cost	Check if offline prints are coming
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )
_____	_____	$ _____	( )

( ) Printouts rec'd
( ) Notified

Total Amount Due $ _____

Date paid _____ Cash $ _____ Check $ _____ IDT $ _____

1/89

END USER INSTRUCTION - SEARCHING ONLINE BIBLIOGRAPHIC DATABASES

DISTRIBUTION OF ONLINE SEARCH RESULTS

University of Alberta Library

Policy

The Library respects the copyright of the database owners. Distribution and use of online search results utilizing library search accounts is therefore subject to the following guidelines.

I. General restrictions derived from copyright law.

The keyword analysis, the abstract and the text (if provided) of an article or text are copywritten by the database owner in the same way as text in a book. Their use is subject to the fair dealing provisions of the Copyright Act.

II. Database specific restrictions derived from the vendor/library contract.

The Library follows such other conditions as may be specified in the vendor contract for each particular database.

These contract restrictions can be generally summarized as follows:

1. Any use of copywritten material will be acknowledged.

2. NO alterations beyond reformatting will be made in copywritten material.

3. **AT MOST** only one machine readable copy of results of a search may be retained. In some cases this single copy may be stored in an individual database for personal use. In other cases it can only be retained until a print copy is made or for a specified period of time during which a print copy can be made.

Individual databases may have more or less restrictive conditions attached to their use. **Patrons using library accounts for online searching must follow the restrictions applicable to the database(s) they are searching.** The Information and Reserve Center will maintain a listing of the restrictions on databases available using library accounts. This listing will be available to patrons at the Information Desk in all area libraries.

DRAFT March 10, 1989

Louisiana State University
Bliss

Downloaded Search Information

You have requested that your computerized search results be provided in machine readable form. You should be aware of the fact that U.S. copyright regulations consider one-time use by an individual to be "fair use" of the material. Use of downloaded records for such purposes as a minidatabase, published bibliography, or distribution of multiple copies of material may be in violation of copyright restrictions. Please see a librarian for a list of database supplier terms and conditions.

WARNING CONCERNING COPYRIGHT RESTRICTIONS

The copyright law of the United States governs the making of reproductions of copyrighted material. Information received through the *Microcomputer Searching Laboratory* is copyrighted by the database supplier and is not to be used for any purpose other than private study, scholarship, or research, as applicable under the 'fair use' doctrine of the copyright law.

CONFIDENTIALITY

CONTROL/REQUEST NO. 9113.0

SUNY ALBANY LIBRARIES
COMPUTER SEARCH SERVICE
REQUEST FORM

LAST NAME_____ FIRST_____ PHONE: DAY_____
EVE._____

ADDRESS_____

_____

A. Have you done a CSS search here before?
PLEASE CIRCLE ONE (YES/NO)

B. Please circle categories which apply and check (C) the appropriate box/boxes. Users must sign and date agreement.

ACTIVE SUNYA

SUNYA DEPT. OR MAJOR

Business.....B
Criminal Justice.....C
Education.....E
Humanities.....H
Library & Info Science.....L
Natural Science/Math.....N
Public Affairs.....P
Social/Behavioral Science...S
SUNYA Research Ctrs/Inst....R
Univ. Administration.....A
Univ. Libraries.....V
Univ. Libraries - Lib. Wk...J
College of General Studies..G
Social Welfare.....W
Undeclared Major.....M
Other.....O

SUNYA STATUS

Faculty.....F
Graduate Student..G
Undergraduate.....U
Staff.....S
Other.....O

NON-SUNYA (Y)
(includes SUNYA Alumni and other SUNY units)

For-profit Business.....B
Non-profit Organiz.....P
Other SUNY Unit.....N
Academic (non-SUNY).....A
Empire State College.....E
Other.....O

C. ☐ I agree to pay 30% (SUNYA) or 100% (NON-SUNYA) of cost of the online time required for this search and 100% of the cost of such printing as I designate at the time of the search.

Signature_____ Date_____

OR

☐ I have arranged for this search to be charged to a valid account. Account #_____

Signature_____ Date_____

D. PURPOSE OF SEARCH

_____Term Paper
_____Thesis or Dissertation
_____Research
_____Other (Specify)

LANGUAGE SPECIFICATIONS

_____English Only
_____Other (Specify)

SEARCH RESTRICTION

Please indicate search limitations such as: human; animal; plant; age; female; male; grade level; time period; racial or ethnic group; geographic area.

E. Please give a narrative description* of the information you seek and titles of relevant citations, if you have them.

---

*Search topics are confidential and, except for necessary Library faculty consultation, will not be shared with others without patron consent. If confidentiality is of concern, please write the description of the information you seek on a separate sheet and request to retain the sheet and your search strategy.

Revised 4/86

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SEARCHER (INITIALS ONLY)_____ DATE SEARCH PERFORMED (MM/DD/YY)_____

SUNYA ACCT. (S)_____GRANT NO. (G)_____NON-SUNYA ACCT. (N)_____CASH(C)/FREE(F)

SEARCH PERFORMED AT: MAIN LIBRARY (M) / GLPP (G) PERSONAL ACCT. (P)_____

PRINTOUT PICKUP: MAIN LIBRARY (M) / GLPP (G)

SUMMARY OF CHARGES

Search/ Merge #	Vendor**	Database	-----Paid Now----- Search* Charges	Online Printing	-----Paid Later----- Search* Charges	Offline Printing	Zero Result
							Y N
							Y N
							Y N
							Y N
							Y N
							Y N
							Y N
		Subtotals					

Charges Paid Now

Search Charges _____

- Waived _____

Search Charge Subtotal _____

(A) 30% / 100% of Search-Charge Subtotal*** _____

Online Printing _____

- Waived _____

(B) Printing Subtotal _____

(C) 5.93% (.0593) of Print Subtotal (Categories S + G only) _____

(D) 15.51% (.1551) of Print Subtotal _____

Amount Owed (A+B+C or D) _____

Paid _____

Date _____

Charges Paid Later

Search Charges _____

- Waived _____

Search Charge Subtotal _____

(A) 30% / 100% of Search-Charge Subtotal*** _____

Offline Printing _____

- Waived _____

(B) Printing Subtotal _____

(C) 5.93% (.0593) of Print Subtotal (Categories S + G only) _____

(D) 15.51% (.1551) of Print Subtotal _____

Amount Owed (A+B+C or D) _____

Checked in by _____

Date _____

* Search charges include connect time, royalty fees, and communication costs.

** Vendors: BRS 1, Dialog 2, NYS Library 3, Westlaw 4, Wilson 5, CAS 6, Bancroft Parkman 7 VU-TEXT 8, BRS After Dark 9.

*** If SUNYA search charges are over $42 charge the difference between search charges and $30. For example, if search charges = $50, subtract $30; patron is charged $20.

1.3 *CONFIDENTIALITY*

Brown University Library endorses statement III of the American Library Association's Code of Ethics which states: "Librarians must protect each user's right to privacy with respect to information sought or received, and materials consulted, borrowed, or acquired." Search subjects will not be discussed with other requestors who may be competitors. Search topics and strategies will not be made publicly available unless written permission is received from the requestor.

1.4 *COMPLAINTS*

Requestors who are not satisfied with the results of their search, or have questions concerning the billing, should be referred to the searcher who performed the search. Questions which can not be resolved at this level should be referred to the Head of Reference.

1.5 *FEE STRUCTURE FOR PAID SEARCHES*

1. Brown Students Without a Grant Account

   a) Standard Search (maximum of 20 minutes and 30 full citations)
   Charge the actual cost of the search plus the offline and online citation charges with $10 being the maximum charged. Ten citations without the source may be printed online to determine relevance. Time segmented databases are considered one database. For each additional database searched, an additional $5 charge will be added plus the offline and online citation charges.

   b) Non-Standard Search
   If the search exceeds 20 minutes or 30 citations, then the student will pay full vendor charges with a $10 minimum being charged. Offline and online charges are added costs.

2. BROWN FACULTY,STAFF AND PERSONNEL AT AFFILIATED AND UNAFFILIATED LOCAL HEALTH CARE ORGANIZATIONS

   These users will pay full vendor charges with a minimum charge of $10.

3. MEDLINE USERS

   MEDLINE searching is available to any user regardless of their affiliation with Brown as staff time permits. There will be a minimum charge of $10 for searching this database. If the cost exceeds $10, then the user will pay full vendor charges. There will be an additional charge for offline prints.

SERVICES/DOWNLOADING

actual cost.

3. Guidelines for downloading:

Downloading should be done within the parameters established by the database vendors.

Patrons should provide their own formatted disks.

Charges for citations will be at the usual rates.

Printing and reformatting will not normally be done at the library.

Searches of full-text databases and databases with unusually expensive citation formats, such as Disclosure, are not covered by this policy. Pricing policies to cover searches of these databases are under development.

This policy was adopted on an experimental basis on July 1, 1987 and revised on February 15, 1988 and November 15, 1988. It is subject to revision as vendor practices and library budget constraints require.

July 1, 1987
Rev. November 28, 1988

Pricing2.jtt

DATA DOWNLOADING

INTRODUCTION

Downloading of data, in the context of WATMARS searches, is the capture of the search results in machine readable format, generally a diskette. As this is seen by data producers as making copyright violations easier, and causing loss of revenue various controls have to be in place.

1. As the appropriate hardware and software are not at the sole disposal of WATMARS staff arrangements must be made to use equipment designated for other operations. Scheduling of this use should not conflict with use by others.

2. The patron should provide his or her own diskette. Check the size of disk drive the patron uses, 3.5 or 5.25".

3. Data on the diskette will be in ASCII code in a PC-DOS format data file and usable by IBM-PC compatible machinery. Other formats, such as Apple, are not supported.

4. The product provided will be a log of transactions (i.e. if printed out using the TYPE command it would look like the usual printout from a search). No further processing of the data will be done for patrons by Library staff as part of WATMARS services.

5. The patron must sign the download agreement form. The data are being provided in a form which allows easy violation of copyright. We cannot police use of the data after it leaves the Library and must assume that our patrons are honest. However we must ensure that the patron is aware of his or her copyright obligations and that there are established, legal methods for handling most uses of the data. (see 6. below)

6. Should the patron wish to download data for eventual redistribution or resale, or if the number of records downloaded will exceed 1,000 per database per year he or she should be directed to the Coordinator, WATMARS so that necessary arrangements can be made with the database producer.

7. If there is any objection to restrictions on the use of downloaded data due to copyright, the objector should be directed to University of Waterloo policies
   #61, Computer software, and
   #64, Use of proprietary computer software.
   The definition of computer software includes data which is acquired through a computer from a central data bank.

October 23, 1987

UNIVERSITY OF VIRGINIA LIBRARY

Policies on Downloading
from Databases Accessed through Commercial Vendors

DEFINITION

Downloading is the copying of data in machine-readable form from a database onto a local electronic storage device.

POLICIES

1. The University of Virginia Library will download from databases available from commercial search services only in accordance with the University's guidelines on the copying of copyrighted material as contained in the Financial Policies Manual, and in accordance with all applicable statements or policies on downloading issued by the search service on which the database is mounted or by the producer of the database. The individual requestor is responsible for determining that his or her downloading request is permitted under these policies and guidelines, and must sign a statement to that effect.

2. Unless the requestor has obtained written permission to download from the database producer, and signs a statement to that effect, the University Library will download only from those databases for which the Library has on file a statement from the database producer permitting downloading for fair use.

3. The requestor must agree to use the file only for private study, scholarship, or research, and to erase the downloaded file upon completion of the project for which the file was downloaded.

4. The Library will not pay downloading fees; the requestor is responsible for any such fees.

5. The Library reserves the right to refuse any request to download if, in its judgment, the downloading would violate the University's guidelines on the copying of copyrighted material.

6. Persons requesting downloading to a diskette must supply their own diskette.

UNIVERSITY OF VIRGINIA LIBRARY

REQUEST FOR DOWNLOADING: POLICY STATEMENT ON FILE

This form must be read and signed by the requestor.

I have read and I understand the University's guidelines on the copying of copyrighted material set forth in the Financial Policies Manual and available at all University Library search locations. It is my judgment that the material I am requesting to download complies with these guidelines and with the written policy statement from the database producer on file in all University Library search locations. I will use the downloaded file only for private study, scholarship, or research, and will erase the file upon completion of the project for which the downloaded file was created.

Signature_____

Print name_____

Date_____

NOTICE
WARNING CONCERNING COPYRIGHT
RESTRICTIONS

The copyright law of the United Sates (Title 17, U.S. Code) governs the reproduction of copyrighted material.

Under certain conditions specified in the law, libraries are authorized to furnish a reproduction. One of these specified conditions is that the reproduction is not to be used for any purpose other than private study, scholarship, or research. Resale or other commercial use of reproduced data is prohibited without express, written permission from the copyright holder. If a user makes a request for, or later uses, a reproduction for purposes in excess of "fair use," that user may be liable for copyright infringement.

This institution reserves the right to refuse to accept a request to download if, in its judgment, fulfillment of the request would involve violation of copyright law.

UNIVERSITY OF VIRGINIA LIBRARY

REQUEST FOR DOWNLOADING: **NO** POLICY STATEMENT ON FILE

This form must be read and signed by the requestor.

I have read and I understand the University's guidelines on the copying of copyrighted material set forth in the Financial Policies Manual and available at all University Library search locations. It is my judgment that the material I am requesting to download complies with these guidelines. I have received written permission to download from the database producer. I will use the downloaded file only for private study, scholarship, or research, and will erase the file upon completion of the project for which the downloaded file was created.

Signature_____

Print name_____

Date_____

NOTICE
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This institution reserves the right to refuse to accept a request to download if, in its judgment, fulfillment of the request would involve violation of copyright law.

READY REFERENCE/INTERLIBRARY LOAN

SYRACUSE UNIVERSITY LIBRARY
ONLINE READY REFERENCE

I. Introduction

Online ready reference searching involves a quick dip into a readily identifiable database. This should result in less than 5 minutes online and less than 10 citations. Initial work must have been done by the patron, such as indexes or other reference tools checked. This will aid the searcher in determining the database and approach to be taken. The final decision on a ready reference search rests with the searcher, in consultation with the referring staff member. For faculty, staff and students, if all criteria are met, there will be no charge for this type of search.

II. Policies

Ready reference searches will be done for the following purposes, bearing in mind the above overriding criteria:

A. Verification of citations

1. Incomplete or garbled information, e.g. partial author name, subject, source, title/article or combination.

B. Current information

1. Buzzwords or hot topics for which controlled vocabulary has not yet been developed.

2. Obscure or unindexed topic/terminology for which indexing/controlled vocabulary does not exist.

C. Tools are not available

1. Sci-Tech library has most recent edition.

2. Most recent issue of index not yet received in library.

III. Procedures

1. Potential ready reference search determined by desk staff.

2. Check in Room 112 for Pamela or Lesley.

3. If not in Room 112, call Lesley at 2091.

4. If not available, check with Julie for whereabouts.

5. If not available, have patron fill out form and find out when they will check back, or if we should call them with the result.

SYRACUSE UNIVERSITY LIBRARY
Online Ready Reference Request Form

Online ready reference searching involves a quick dip into a readily identifiable database to verify a fact or retrieve limited references. Please indicate the sources you have already used in attempting to locate the desired information. We need to have this information in order to proceed with the search. The final decision on whether a ready reference search will be conducted rests with the searcher in consultation with the referring staff member.

Question:

Subject/Discipline/Course:

Sources checked:

PATRON NAME_____PHONE_____

STATUS: ___Undergrd ____Grad ____Faculty ____Staff ____Other

Referred by_____DATE_____

IOWA STATE UNIVERSITY
REFERENCE SEARCHING OF ONLINE DATABASES

Funds have been allocated to support the use of online information resources to answer certain types of questions posed by ISU students, faculty, and staff. Within the guidelines given below, these searches will be performed at no cost to the patron. Searches outside of these guidelines will be performed on the usual cost-recovery basis.

1. **Verification.** When other tools prove to be inadequate or too cumbersome, bibliographic files may be used to verify or complete a patron's reference.

2. **Directory information.** When printed reference tools fail to provide adequate information, certain directory files may be queried.

3. **Reference works online.** Files like the Super Index may be queried to identify sources of data or other factual information.

4. **Indexes.** Online files may be used as an adjunct to printed indexes which we own. For example, when an index/abstract is at the bindery the online version may be used as a backup. For indexes whose indexing vocabulary is cumbersome, the online file may be searched free-text to determine an appropriate indexing term.

5. **Des Moines Register Index.** The online index offered by the Register may be searched as a complement to our printed index. We will not compile extensive bibliographies, but rather supplement our other tools.

6. **Brief bibliographic searches.** At the discretion of the Librarian a database may be searched for 1 to 10 references on a topic which is very difficult or impossible to search in a printed index. These will be relatively simple, straightforward searches; patrons will continue to pay for longer and more complex searches.

7. **Preparation for fee based searches.** If necessary, a database may be searched to explore its coverage of a topic that is the subject of a fee-based search. These exploratory searches should be relatively simple, straightford examinations of how key terms are used in that database. No more than 10 references are to be displayed. References are to be displayed with titles and descriptors only. Patrons will pay for full scale searches that may follow this preparatory search. Record as Reference search.

8. **Training.** Many of the ongoing search training needs of Information Services Librarians will be met by the department's CD-ROM services and in-house orientation seminars as well as the tutorials, practice files, and free databases offered by database vendors. However, reference funds may be used for limited training on new online systems and services and for limited training by those librarians whose areas of search responsibility have changed.

9. **Other.** Additional reference uses for online databases will undoubtedly arise. As long as they are brief, produce a short list of references and represent a cost-effective use of resources, they should be appropriate.

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The following policy is taken from:

Public Service Policy Manual, Computer Assisted Research Services, Otto G. Richter Library, University of Miami, Fall 1988.

3.2 THE USE OF ONLINE DATABASE SERVICES AT REFERENCE DESKS AND INTERLIBRARY LOAN

3.2.1 Introduction

3.2.1.1 Nature of Online Reference Desk Database Service

The use of online database services in public service complements traditional methods of user assistance. Computerized databases offer unique opportunities to expedite and expand assistance to patrons and increase the productivity of librarians.

In contrast to the COMPUTER ASSISTED RESEARCH SERVICE (COMPASS), online searches at the reference desk and in the Interlibrary Loan Department are impromptu, informal, and ready-reference orientated. These searches are underwritten by the Library to assist librarians in giving more efficient service.

Reference librarians will exercise their discretion and professional judgment in using these services within the guidelines as set forth

in this policy statement.

3.2.1.2 Purpose

The purpose of this policy is to establish guidelines for the use of online database services in the Reference Departments and the Interlibrary Loan Department. This policy is to be referred to as a source to answer questions concerning the management and operation of the online database reference service.

3.2.2 Types of service

3.2.2.1 General Statement

The decision to use an online database to answer a reference inquiry is made by the librarian, not the patron. Patrons who specifically request a computer search will be referred to the COMPASS office.

3.2.2.2 Services

Online database services can be used for the

following types of searches:

1. Reference desk services

    a. Informational -- answers to specific questions, statistics, etc.

    b. Bibliographic -- for location and verification of bibliographic items.

    c. Current Awareness -- searches for "hot topics" not easily available in library reference sources.

    d. Online searches will not be used to identify information for students who have obviously been given assignments to familiarize themselves with the printed edition of the reference source in their discipline.

2. Interlibrary loan services

    a. Verification/borrowing purposes - for verifying citations for Interlibrary

Loan borrowing purposes.

b. Verification/lending purposes - for verifying citations for Interlibrary Loan lending purposes.

3.2.2.3 Guarantee of Service

There is no guarantee the source document retrieved will be owned by the library.

3.2.3 Library Patrons

A major purpose of Online Reference Desk Database Services is to conserve the time of librarians and to promote general productivity. All patrons who are authorized library users (for example, those with courtesy passes and the public admitted to use government documents) may benefit from online reference desk database assistance.

3.2.4 Guidelines for the use of computerized information sources at public service reference desks

A. Reference Desk Policies and Instructions:

1. The information sought should be factual and specific in nature.

2. Searches will be brief (i.e. two to four minutes) and produce no more than several citations.

3. No offline prints will be generated.

4. The information sought should not be readily available from print sources in the Library.

B. Telephone inquiries

At this time, the service is not available for telephone reference inquiries.

3.2.5 General instructions and limitations for online reference desk service

Online databases may be used:

1. To verify citations that are incomplete, elusive or garbled.

2. To locate information that is too current to be covered

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in the print indexes.

3. To verify citations that require searching through many years and/or many different sources.

4. To locate or identify new or imprecisely used concepts (i.e. "hot topics" or buzz words) or to find the definition of an unfamiliar term.

5. To identify information that is only available through an online search.

6. To identify the meanings of acronyms not found in standard print sources.

7. To locate information in newspapers that cannot be identified through the print indexes.

8. To determine what indexes are best searched for a topic.

9. To retrieve a few "started citations" for topics that prove elusive in the print indexes.

10. To identify hard facts.

11. To locate current addresses of individuals through the

corporate source or institution fields of indexes.

11. To locate a review article or bibliography.

12. To locate a biography or profile.

3.2.6 Interlibrary Loan use of online database services

3.1.6.1 General Statement

The success of Interlibrary loan is dependent upon identifying, locating, and acquiring documents that are not owned by our library. Access to online database vendors and their related services (i.e. document delivery) enhances the effectiveness of the Interlibrary Loan Department.

3.2.6.2 Appropriate use of online services include:

1. Verifying elusive, garbled or incomplete citations.

2. Locating items not found in the OCLC catalog or not found expeditiously in other standard sources.

3. The use of online ordering and document

delivery services.

3.2.7 Collection development

Producing brief bibliographies and other types of searches may be conducted to support collection development work.

3.2.8 Bibliographic services

3.2.8.1 Reference Initiated

Bibliographies on issues and topics of special interest to our community and region may be generated to be kept at the reference desk.

3.2.8.2 Current Awareness Service

Bibliographies on "Hot Topics" may be produced to be kept at the reference desk.

3.2.9 Ethics of service

The patron's inquiry will remain confidential outside a professional context regardless of the method chosen to provide reference assistance.

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SELECTED READING LIST

SELECTED READINGS

Auster, Ethel. *Managing Online Reference Services*. New York: Neal-Schuman Publishers, 1986.

Bonta, Bruce D. "Online Searching in the Reference Room." *Library Trends* 31(3): 495-510, Winter 1983.

Britten, William A. "Supply Side Searching: An Alternative to Fee-Based Online Services." *Journal of Academic Librarianship* 13(3): 147-50, July 1987.

Cook, M. Kathleen and Mary K. Isbell. "Confidentiality of Online Bibliographic Searches: Attitudes and Practices." *RQ* 25(4): 483-7, 1986.

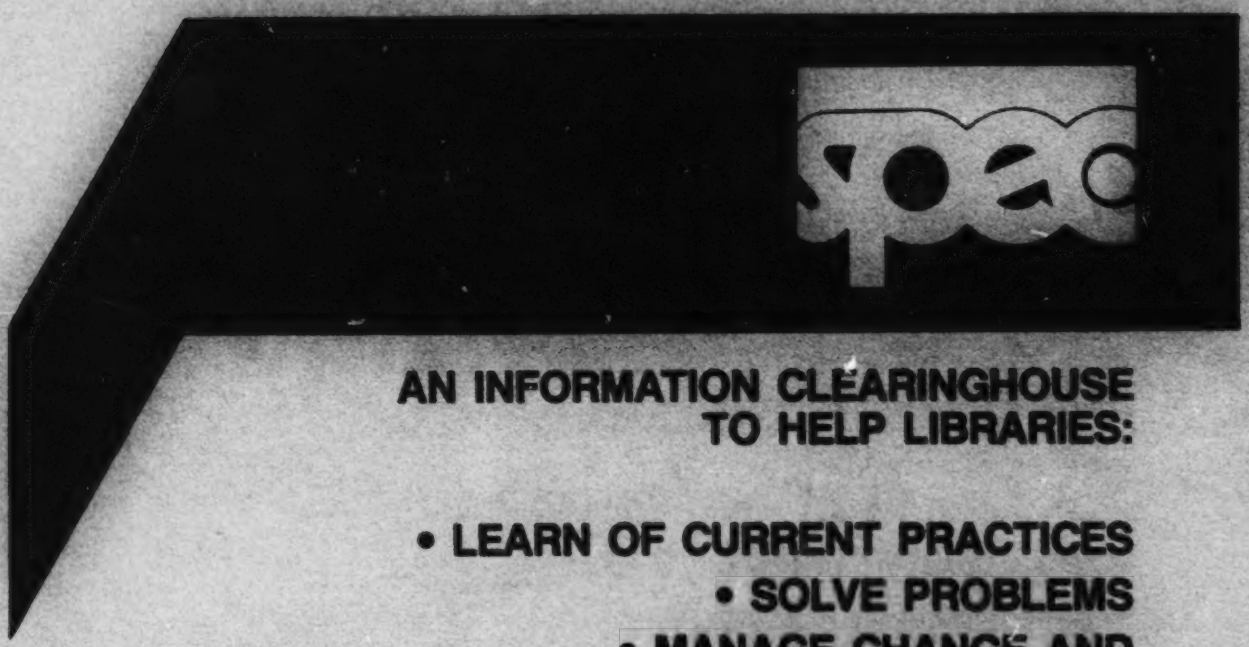
Lewis, D.P. "Copyright Aspects of Databases." *Computer Law and Practice* 4(1): 2-8, Sept.-Oct. 1987.

Pagell, R. "Downloading and Postprocessing: What You Can Do After the Search Is Over and How" pp. 153-9 IN *Online '87* v.1. Weston, CT: Online, Inc., 1987.

Talab, R.S. "Copyright and Database Downloading." *Library Computing Supplement to Library Journal* 110(8): 144-7, Nov. 1, 1985.

Tarter, B. "Information Liability: New Interpretations for Electronic Publishing." *Online* 10(5): 61-7, Sept. 1986.

SYSTEMS AND PROCEDURES EXCHANGE CENTER



AN INFORMATION CLEARINGHOUSE TO HELP LIBRARIES:

- **LEARN OF CURRENT PRACTICES**
- **SOLVE PROBLEMS**
- **MANAGE CHANGE AND**
- **IMPROVE PERFORMANCE**

Association of Research Libraries
OFFICE OF MANAGEMENT STUDIES
1527 New Hampshire Avenue, N.W.
Washington, D.C. 20036

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